

Login Page

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.

For now, passwords are their Windows Domain network password. But future versions may need to consider non-Domain logins to be allowed into the back end system. And of course, if there is another application for the "Front-End" (e.g. congregation-facing), those would obviously require non-domain logins as well.

Note that for now 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](mailto:it@alcf.net).

**Username or Email:**

**Password:**

Log In

goes to **Screen 1.1**

Main Menu

This acts as the "Main Menu" for the entire admin-site of the application.

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:

- View-Only User (similar to Staff user, but without any edit privileges *whatsoever*)
- 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
- CanMergeIndividuals
- CanEditMembershipStatus

**TODO:** "Organization" or "Company" will need to be defined, in order to support organizations / companies that have financially given to ALCF in the past.

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

# ALCF Church Management System

Welcome, Joe User

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT
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## Main Menu

### Quick Search: People

First Name:

Last Name:

Search for Person

goes to **Screen 2.1**

### Quick Search: Groups

Name:

Search for Group

goes to **Screen 4.1**

People

Manage individual membership records

goes to **Screen 2.1**

Households

Manage household records

goes to **Screen 3.1**

Groups

Manage group records

goes to **Screen 4.1.1**

Communications

Manage communication lists

goes to **Screen 5.1**

Administration

Manage administration tasks for the ALCF ChMS

goes to **Screen 6.1**

## Search for an Individual

This allows the user to search for an any individual in the ChMS.

Each individual can be a membership status of type:

- Member
- Child of Member
- Former Member
- None

Children may or may not necessarily have membership status. Note that for purposes of reporting, children of parents who are members would be considered a "member" when it comes to annual reports / totals.

Membership status cannot be manually assigned. Only users with CanEditMembershiStatus permission can specify a membership period for an individual, which will then update the calculation of "membership status" for that individual.

Reminder: 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.

To ask Oom: currently we have some businesses in ACS due to a donation from a business, specifically. They are currently "individuals" in ACS.

PEOPLE

HOUSEHOLDS

GROUPS

COMMUNICATIONS

ADMINISTRATION

LOG OUT

## Search for an Individual

### Search / Filter List

- View All Statuses -

Refresh List

refreshes table below

Results: Viewing people 1-20 of 2141.

[Previous](#) | [Next](#)

<u>First Name</u>	<u>LAST NAME v</u>	<u>Membership Status</u>	<u>Address</u>	<u>City</u>
<a href="#">Page</a>	<a href="#">Alexander</a>	Non-Member	41098 Mill Valley Way	Anderson
<a href="#">Silvanus</a>	<a href="#">Barry</a>	Non-Member	1040 La Canada Flintridge Dr.	Hercules
<a href="#">Susy</a>	<a href="#">Barry</a>	Non-Member/Tithe	76207 Walnut Ave.	Irwindale
<a href="#">Walden</a>	<a href="#">Barry</a>	Non-Member	31558 Kerman Blvd.	East Palo Alto
<a href="#">Benedict</a>	<a href="#">Bennett</a>	Member	30811 Palm Springs Road	Bell
<a href="#">Dandy</a>	<a href="#">Brooks</a>	Member	88436 Mountain View Road	Commerce
<a href="#">Burleigh</a>	<a href="#">Buckley</a>	Non-Member	54019 Industry Ave.	Capitola
<a href="#">Bass</a>	<a href="#">Burke</a>	Non-Member/Tithe	59216 Reedley Dr.	Antioch
<a href="#">Amorita</a>	<a href="#">Chang</a>	Member	30200 Elk Grove St.	Agoura Hills
<a href="#">Worthington</a>	<a href="#">Coleman</a>	Non-Member/Tithe	25835 Emeryville Blvd.	Hillsborough
<a href="#">Lula</a>	<a href="#">Collins</a>	Non-Member	80939 Canyon Lake Dr.	Colton
<a href="#">Minna</a>	<a href="#">Cook</a>	Member	2279 Sonora Road	Lakeport
<a href="#">Tilda</a>	<a href="#">Cullen</a>	Non-Member	83531 Chico Blvd.	Biggs
<a href="#">Russell</a>	<a href="#">Cunningham</a>	Member	54957 Hughson Way	Laguna Niguel
<a href="#">Abbie</a>	<a href="#">Davis</a>	Non-Member/Tithe	56850 El Cajon Road	West Sacramento
<a href="#">Martie</a>	<a href="#">Davis</a>	Non-Member/Tithe	33924 Fullerton St.	La Mesa
<a href="#">Toinette</a>	<a href="#">Davis</a>	Member	41077 Dorris Dr.	Truckee
<a href="#">Bowie</a>	<a href="#">Doherty</a>	Non-Member	37431 Santa Monica St.	Salinas
<a href="#">Griz</a>	<a href="#">Donnelly</a>	Non-Member/Tithe	65033 Cudahy Blvd.	Blythe
<a href="#">Tina</a>	<a href="#">Doyle</a>	Member	77280 Redwood City Way	Indian Wells
<a href="#">Beverly</a>	<a href="#">Duffy</a>	Non-Member/Tithe	12497 La Habra Road	Fort Bragg

View an Individual – General Profile Tab  
Single Household

This screen shows the details of any given  
individual in the system.

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 multi-person household  
would be displayed on **Screen 2.2**
- Individual that is part of a single-person  
households (e.g. single person) would be displayed  
on **Screen 2.2.1**
- Individual that has no household record (e.g. no  
home address on file) would be displayed on  
**Screen 2.2.1.1**
- 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.

Individuals defined in a household are individuals  
with the same home address that are in the same  
family unit (one or two parents and their children or  
children that they are legal guardians of).

Roommates, although they live in the same home  
address, are not considered in the same  
household. Moreover, adult siblings (e.g. two  
siblings that are both adults that happen to be  
roommating in the same house) would not be  
considered in the same household as well. The  
general rule of thumb for "same family unit" is: if the  
family requires just one stewardship receipt, then  
they would generally be considered in the same  
family unit. If an individual in that family requires a  
separate receipt, then they would likely be a  
candidate as a "separate household".

Households must have one and only one person  
marked as the "head of household". Note that due  
to a lack of data, we may have individuals that are  
children with no data for the child's parents. If we  
have no data for their parents, but we have a home  
address, then the child would be in a single-person  
household and would be the "head of household".  
This would be changed once the parent information  
is entered.

For any other members of a household other than  
"head", the system will try and deduce the  
relationship to the head of household based on any  
declared family relationships. Otherwise, it will  
simply say "other" with the option for the user to  
explicitly specify the relationship using a text field.

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**, **Screen 2.2.1.1** or  
**Screen 2.2.2** for that individual, depending on the  
individual him/herself according to the rules detailed  
above.

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT
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## Individual: John Smith

John Smith Household

425 Western Ave, Sunnyvale

John Smith

Head

Keri Brown

Wife

Jack Smith

Son

Merge Records

to Screen 2.7

General Profile

to Screen 2.3.1

Contact Information

to Screen 2.4.1

Groups

to Screen 2.5

Comments

to Screen 2.6

Stewardship

to Screen 2.9

Attributes

Edit

to Screen 2.2.3

Full Name:

Dr. Jonathan Mark Smith, III

Goes By:

John Smith

Date of Birth:

March 1, 1977 (32 years old)

Gender:

Male

Deceased:

Yes

Edit

to Screen 2.2.4

Membership Status:

Member, since June 22, 2006 (3 years)

Prior membership from January 15, 2002 - March 28, 2003

Prior membership from April 12, 1996 - November 4, 1999

Edit

to Screen 2.2.5.1

Family Information:

Married, to Keri Brown on June 24, 2006 (3 years)

Sister: Joanna Smith-Stevens

Son: Jack Smith

Mother: Percilla Smith

Father: Don Smith

Edit

to Screen 2.2.5.2

Household:

Head of the John Smith Household

to Screen 3.2

Details

to Screen 2.3.1

Primary Contact Info:

408-555-1212

jsmith@gmail.com

Record last updated on February 23, 2009 by Doris Cohen

[View Change Log](#)

View an Individual – General Profile Tab  
Single-Person Household

See [Screen 2.2](#) for notes.

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT
--------	------------	--------	----------------	----------------	---------

## Individual: John Smith

John Smith Household  
425 Western Ave, Sunnyvale

John Smith

Head

Merge Records

to Screen 2.7

General Profile

to Screen 2.3.1

Contact Information

to Screen 2.4.1

Groups

to Screen 2.5

Comments

to Screen 2.6

Stewardship

to Screen 2.9

Attributes

Edit

to Screen 2.2.3

**Full Name:** Dr. Jonathan Mark Smith, III

**Goes By:** John Smith

**Date of Birth:** March 1, 1977 (32 years old)

**Gender:** Male

Edit

to Screen 2.2.4

**Membership Status:** Member, since June 22, 2006 (3 years)

Prior membership from January 15, 2002 - March 28, 2003

Prior membership from April 12, 1996 - November 4, 1999

Edit

to Screen 2.2.5.1

**Family Information:** Single

Sister: [Joanna Smith-Stevens](#)

Son: [Jack Smith](#)

Mother: [Percilla Smith](#)

Father: [Don Smith](#)

Edit

to Screen 2.2.5.2

**Household:** Head of the [John Smith Household](#) (Single Person Household)

to Screen 3.2


Details

to Screen 2.3.1

**Primary Contact Info:** 408-555-1212

[jsmith@gmail.com](mailto:jsmith@gmail.com)

102 px




Edit

to Screen 2.2.5

Record last updated on February 23, 2009 by [Doris Cohen](#)

[View Change Log](#)

ChMS Main IA.graffle  
Wed Feb 03 2010  
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 ALCF  
Following the vision of Jesus Christ

768 px

+240 px

View an Individual – General Profile Tab  
No Household on File

See **Screen 2.2** for notes.

There may be several reasons why we have an individual that has no household information on file:

- They signed up at a ministry event using only an email address and/or phone number
- They sent in a tithe without any home address
- The individual is homeless and does not have a home address, only a contact address (e.g. a shelter and/or a PO Box)

Individuals without a household record on file and individuals with a household record on file are treated the exact same and have the exact same rules in the system.

The *only* difference is that individuals without a household record on file can have a home phone associated with the individual. Otherwise, the home phone is normally associated with the household record.

Ask Oom: Do we track stewardship for Individuals with no household / home address on file? How do we do that?

PEOPLE

HOUSEHOLDS

GROUPS

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LOG OUT

## Individual: John Smith

No Household on File

[Create One](#)

to Screen 2.8

John Smith

General Profile

to Screen 2.3.1.1

Contact Information

to Screen 2.4.1

Groups

to Screen 2.5

Comments

Edit

to Screen 2.2.3

**Full Name:** Dr. Jonathan Mark Smith, III

**Goes By:** John Smith

**Date of Birth:** March 1, 1977 (32 years old)

**Gender:** Male

**Membership Status:** Non-Member

Edit

to Screen 2.2.5

**Family Information:**

Single

Sister: [Joanna Smith-Stevens](#)

Son: [Jack Smith](#)

Mother: [Percilla Smith](#)

Father: [Don Smith](#)

Edit

to Screen 2.2.5.2

**Household:** No household record on file. [Create One](#)  
to Screen 2.8

Details

to Screen 2.3.1.1

**Primary Contact Info:** 408-555-1212  
[jsmith@gmail.com](mailto:jsmith@gmail.com)



Edit

to Screen 2.2.5

Merge Records

to Screen 2.7

Record last updated on February 23, 2009 by [Doris Cohen](#)

[View Change Log](#)



PEOPLE

HOUSEHOLDS

GROUPS

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LOG OUT

## Individual: John Smith

**Keri Smith Household**  
425 Western Ave, Sunnyvale

**Keri Smith**

*Head*

**Chris Smith**

*Husband*

**John Smith**

*Son*

General Profile

to [Screen 2.3.1](#)

Contact Information

to [Screen 2.4.1](#)

Groups

to [Screen 2.5](#)

Comments

to [Screen 2.6](#)

Stewardship

to [Screen 2.9](#)

Attributes

Edit

to [Screen 2.2.3](#)

**Full Name:** Jonathan Mark Smith, Jr.

**Goes By:** John Smith

**Date of Birth:** March 1, 2007 (2 years old)

**Gender:** Male

Edit

to [Screen 2.2.4](#)

**Membership Status:** Child of Member

Edit

to [Screen 2.2.5](#)

**Family Information:** Single  
Mother: [Keri Smith](#)  
Father: [Chris Smith](#)

Edit

to [Screen 2.2.5.2](#)

**Households:** Son in the [Keri Smith Household](#)  
Son in the [Rick Adams Household](#)  
Minor in the [Amber Westfield Household](#)

Details

to [Screen 2.3.1](#)

**Primary Contact Info:** 408-555-1212  
[jsmith@gmail.com](mailto:jsmith@gmail.com)



Edit

to [Screen 2.2.6](#)

Merge Records

to [Screen 2.7](#)

**Rick Adams Household**  
123 Main Street, Palo Alto

**Amber Westfield Household**  
1852 Mary Ave, Sunnyvale

Record last updated on [February 23, 2009](#) by [Doris Cohen](#)

[View Change Log](#)

## Edit an Individual – General Information

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

PEOPLEHOUSEHOLDSGROUPSCOMMUNICATIONSADMINISTRATIONLOG OUT

Individual: John Smith

Smith Household  
425 Western Ave, Sunnyvale

John Smith  
Head

Keri Brown  
Spouse

Jack Smith  
Child

General Profile

Contact Information

Groups

Comments

Stewardship

to Screen 2.3.1

to Screen 2.4.1

to Screen 2.5

to Screen 2.6

102

Dr.

Jonathan

Mark

Smith

III

Johnny

Patterson, Brown, Richardson

Johnny Smith

To be used for emails, mailings, etc.  
If left blank, "Dr. Jonathan Mark Smith, III"  
will be used.

March 2

Male

No

Update

Cancel

Biographical Information

Date of Birth: March 2

Gender: Male

Deceased: No

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

John Smith  
Head

Keri Brown  
Spouse

Jack Smith  
Child

102

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

If "Deceased" is "Yes", then an added textbox will appear where the user can enter in optional data on the date deceased.

**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.



## 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**

PEOPLEHOUSEHOLDSGROUPSCOMMUNICATIONSADMINISTRATIONLOG OUT

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Individual: John Smith

Smith Household  
425 Western Ave, Sunnyvale

John Smith  
Head

Keri Brown  
Spouse

Jack Smith  
Child

General Profile

to Screen 2.3.1  
Contact Information

to Screen 2.4.1  
Groups

to Screen 2.5  
Comments

to Screen 2.6  
Stewardship

Edit  
to Screen 2.2.3


Full Name: Dr. Jonathan Mark Smith, III

Goes By: John Smith

Member Status: Member

Date of Birth: March 1, 1977 (32 years old)

Gender: Male



Edit  
to Screen 2.2.5

Membership Status

Current Status: Member

Add a Membership Period

Close

Membership Started	Membership Ended
<u>May 1, 2004</u>	<u>Enter a Date</u>
<u>Mar 4, 1999</u>	<u>Apr 24, 2001</u>
<u>Jul 23, 1994</u>	<u>Sep 15, 1997</u>
<u>Jul 23, 1994</u>	<u>Sep 15, 1997</u>

Record last updated on February 23, 2009 by Doris Cohen

[View Change Log](#)

## 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.

If entering a **Membership Ended** date, then **Reason for Termination** will appear with the following options:

- Moved out of the area
- Deceased
- Other

If selecting "Other", an additional textbox will appear allowing the user to enter in more information.

This list of reasons is managed by the ChMS Administrator.

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

PEOPLEHOUSEHOLDSGROUPSCOMMUNICATIONSADMINISTRATIONLOG OUT

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Individual: John Smith

Smith Household  
425 Western Ave, Sunnyvale

John Smith  
Head

Keri Brown  
Spouse

Jack Smith  
Child

General Profile

to Screen 2.3.1  
Contact Information

to Screen 2.4.1  
Groups

to Screen 2.5  
Comments

to Screen 2.6  
Stewardship

Edit  
to Screen 2.2.3


Full Name: Dr. Jonathan Mark Smith, III

Goes By: John Smith

Member Status: Member

Date of Birth: March 1, 1977 (32 years old)

Gender: Male



Edit  
to Screen 2.2.5

Edit Membership Information

Edit a Prior Membership

Membership Started: mm/dd/yyyy

Membership Ended: mm/dd/yyyy

Reason for Termination: - Select One -

Update

Cancel

Record last updated on February 23, 2009 by Doris Cohen

[View Change Log](#)

## Edit an Individual – Marriage Information

This screen allows a user to edit an individual's marriage information.

Note that adding or editing a relationship will change it "both ways".

So if the user edit's "John" and specifies that "Keri" is John's wife, then Keri's record will automatically show John as Keri's husband.

Married Status contains the following options:

- Single
- Married
- Separated

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

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 record in the database.

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 "Combine household data into a single household?"

If attempting to defined a marriage relationship with an individual that is already married to someone else, the system will alert the user that the marriage relationship cannot be defined, and the user will need to manually resolve the issue.

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

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

PEOPLEHOUSEHOLDSGROUPSCOMMUNICATIONSADMINISTRATIONLOG OUT

Welcome, Joe User102

Individual: John Smith

to Screen 2.3.1to Screen 2.4.1to Screen 2.5to Screen 2.6

General ProfileContact InformationGroupsCommentsStewardship

Smith Household  
425 Western Ave, Sunnyvale

John Smith  
Head

Keri Brown  
Spouse

Jack Smith  
Child

Full Name: Dr. Jonathan Mark Smith, III  
Goes By: John Smith

Edit  
to Screen 2.2.3

Edit Marriage Status

Marital Status: Married

Married Since: mm/dd/yyyy

Married To: Keri Brown

Select	First Name	Last Name	Address	City
<input checked="" type="radio"/>	Keri	Brown	425 Western Ave	Sunnyvale
<input type="radio"/>	Keri	Brown-Smith	285 Maple Drive, Apt. #3	Hayward
<input type="radio"/>	Keri Anna	Brownelle	1802 Pasqualito Drive	Antioch
<input type="radio"/>	None of the Above			

UpdateCancel

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

Edit  
to Screen 2.2.5

## Edit an Individual – Family Information

This screen allows a user to edit an individual's family relationships.

Note that adding or editing a relationship will change it "both ways".

So if the user edit's "Chris" and specifies that "Joanne" is Chris's sister, then Joanne's record will automatically show Chris as Joanne's brother.

Grey area will only appear when editing an existing family relationship, or when creating a new one.

The relationship drop down consists of the following options:

- Sibling
- Parent
- Child

Extended family relationships (aunt / uncle, cousin, mother-in-law, etc.) can be deduced by the system in future versions, but are never explicitly defined by the user.

Clicking on **Add a New Relationship** will first prompt the user for the related individual's name information. The system will then do a sound-ex based duplication search and prompt the user to select "an existing individual from the list" or will have the option to "create as a new individual" – a similar process to how individuals are selected in the rest of the system.

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

PEOPLEHOUSEHOLDSGROUPSCOMMUNICATIONSADMINISTRATIONLOG OUT

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Individual: John Smith

Smith Household  
425 Western Ave, Sunnyvale

John Smith  
Head

Keri Brown  
Spouse

Jack Smith  
Child

General Profile

to Screen 2.3.1  
Contact Information

to Screen 2.4.1  
Groups


to Screen 2.5  
Comments

to Screen 2.6  
Stewardship

Edit  
to Screen 2.2.3

Full Name: Dr. Jonathan Mark Smith, III

Goes By: John Smith



Edit  
to Screen 2.2.5

Family Relationships

Edit	First Name	Last Name	Address	Relationship
<a href="#">Edit</a>	Kristine	Smith	4241 Maple Drive, Sunnyvale	Sister
<a href="#">Edit</a>	Patricia	Smith-Patterson	123 Main Street, Palo Alto	Sister
<a href="#">Edit</a>	Jack	Smith	425 Western Ave, Sunnyvale	Son

Related To: Kristine Smith

Relationship: 

Sibling

Remove Relationship

Update

Cancel

Add a New Relationship

Close

Record last updated on February 23, 2009 by Doris Cohen

[View Change Log](#)

## 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.

Dates listed are the dates the photo was uploaded to the system.

**Update** will set the new image will close the window (taking the user back to where he or she came from) .

PEOPLEHOUSEHOLDSGROUPSCOMMUNICATIONSADMINISTRATIONLOG OUT

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Individual: John Smith

Smith Household  
425 Western Ave, Sunnyvale

John Smith  
Head

Keri Brown  
Spouse

Jack Smith  
Child

General Profile

to Screen 2.3.1  
Contact Information

to Screen 2.4.1  
Groups

to Screen 2.5  
Comments

to Screen 2.6  
Stewardship

Edit  
to Screen 2.2.3


Full Name: Dr. Jonathan Mark Smith, III

Goes By: John Smith

Member Status: Member

Date of Birth: March 1, 1977 (32 years old)


Gender: Male




Edit  
to Screen 2.2.5

Edit Individual's Photograph


Select an Image:




Jan 4 2004



Feb 9 2008



Feb 12 2008



May 25 2009

Upload New Image:

Browse...


Update

Cancel

Record last updated on February 23, 2009 by Doris Cohen

[View Change Log](#)

ChMS Main IA.graffle  
Wed Feb 03 2010  
Page 13 of 55

 ALCF  
Following the vision of Jesus Christ

768 px

+240 px



View an Individual – Contact Information Tab Household

This screen shows all the various contact information 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 to a new house.

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 Home address.

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 2.3.3**.

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)
- Temporary
- Other

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

Note: for members that are part of a household, 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
- Fax
- Other

Only one phone can be set as "Primary".

Clicking on email address or the **Add New** button will redirect the user to **Screen 2.3.5**.

Clicking on any "Other Contact" or the **Add New** button will redirect the user to **Screen 2.3.6**.

**Note:** Addresses will either have up to four "address" lines and/or can support international addresses, institutions, military addresses, etc.

## Individual: John Smith

**Smith Household**  
425 Western Ave, Sunnyvale

**John Smith**  
Head

**Keri Brown**  
Spouse

**Jack Smith**  
Child

to Screen 2.2.1

General Profile

Contact Info

to Screen 2.4.1

Groups

to Screen 2.5

Comments

to Screen 2.6

Stewardship

to Screen 2.9

Attributes

### Home Address and Phone for the Smith Household

to Screen 2.3.2

Add New

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

### Other Addresses for John Smith

to Screen 2.3.3

Add New

Address Type	Address	City/State	Zip Code
Current Work	<u>401 El Camino Real</u>	Mountain View, CA	94043
Temporary (Until March 4 2004)	<u>818 Third Street</u>	San Francisco, CA	94107
Previous Home	<u>2811 Hillsdale Road, Apt. #412</u>	Hillsdale, CA	94401
Previous Work	<u>801 Canal Street, Suite #27A</u>	Redwood City, CA	94402

### Phone Numbers for John Smith

to Screen 2.3.4

Add New

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

### Email Addresses

to Screen 2.3.5

Add New

Primary?	Email Address
Primary	<u>john_smith@gmail.com</u>
<u>[set as primary]</u>	<u>jsmith1231@yahoo.com</u>
<u>[set as primary]</u>	<u>john.f.smith@company.org</u>

#### Primary Mailing Address

Current Home (425 Western Avenue)

#### Stewardship Receipt Address

Current Work (401 El Camino Real)

#### Contact Preferences

- Okay to Mail
- Okay to Email
- NOT Okay to Telephone

to Screen 2.3.7

Edit

### Other Contact Information

to Screen 2.3.6

Add New

Contact Type	Value
AIM Screen Name	<u>jsmith48421</u>
Facebook ID	<u>28410241</u>
Twitter Account Name	<u>john_smith_4_17</u>
Yahoo! Messenger Name	<u>jsmith1231</u>



View an Individual – Contact Information Tab  
No Household

See **Screen 2.3.1** for more information.

This screen is used for individuals who have NO household. They cannot have a current home address defined without creating or assigning a household record.

They can have other addresses (work, mailing, other, etc.) defined, and they can have a Home phone defined.

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LOG OUT

## Individual: John Smith

No Household  
[Create One](#)

to Screen 2.8

**John Smith**  
Individual

to Screen 2.2.1.1

General Profile

Contact Info

to Screen 2.4.1

Groups

to Screen 2.5

Comments

### Non-“Current Home” Addresses for John Smith

to Screen 2.3.3

[Add New](#)

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

### Phone Numbers for John Smith

to Screen 2.3.4

[Add New](#)

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

### Email Addresses

to Screen 2.3.5

[Add New](#)

Primary?	Email Address
Primary	<a href="#">john_smith@gmail.com</a>
<a href="#">[set as primary]</a>	<a href="#">jsmith1231@yahoo.com</a>
<a href="#">[set as primary]</a>	<a href="#">john.f.smith@company.org</a>

### Other Contact Information for John Smith

to Screen 2.3.6

[Add New](#)

Contact Type	Value
AIM Screen Name	<a href="#">jsmith48421</a>
Facebook ID	<a href="#">28410241</a>
Twitter Account Name	<a href="#">john_smith_4_17</a>
Yahoo! Messenger Name	<a href="#">jsmith1231</a>

Edit an Individual – Household Address and  
Phone

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?"

If the address being edited is current, then the  
Current/Previous drop-down and the Delete button  
are both grayed-out.

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

Clicking **Update** will save the record, while Delete  
will delete the record. The **Update**, **Delete** and  
**Cancel** buttons will close the window, redirecting  
the user back to **Screen 2.3.1**.

# ALCF Church Management System

Welcome, Joe User

PEOPLE

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LOG OUT

## Individual: John Smith

**Smith Household**  
425 Western Ave, Sunnyvale

**John Smith**  
*Head*

**Keri Brown**  
*Spouse*

**Jack Smith**  
*Child*

to Screen 2.2.1

General Profile

Contact Info

to Screen 2.4.1

Groups

to Screen 2.5

Comments

to Screen 2.6

Stewardship

to Screen 2.9

Attributes

### Home Address and Phone for the Smith Household

to Screen 2.3.2

Add New

Current	Address	City/State	Zip Code	Home Phone
Current Home	425 Western Ave	Sunnyvale, CA	94086	408-555-1212
Previous Home	123 Main Street, Apt. #2	Palo Alto, CA	94011	650-555-1212
Previous Home	456 Elm Street	San Jose, CA	95125	408-555-1725

to Screen 2.3.3

Add New

to Screen 2.3.5

Add New

### Home Address

Current/Previous: Current Home Address

Address 1: 425 Western Ave.

Address 2:

City, State, Postal Code: City - State - Postal Code

Primary?

Primary Home Phone: 650-555-1212

Alternate Home Phone: 650-824-1241

Alternate Home Phone: 650-555-1234

Add Another

Delete

Update

Cancel

### Other Contact Information

to Screen 2.3.6

Add New

Contact Type	Value
AIM Screen Name	jsmith48421
Facebook ID	28410241
Twitter Account Name	john_smith_4_17
Yahoo! Messenger Name	jsmith1231

Current Work (401 El Camino Real)

### Contact Preferences

- Okay to Mail
- Okay to Email
- NOT Okay to Telephone

to Screen 2.3.7

Edit

Edit an Individual – Other Address

This dialog box allows the user to add a new or edit an existing "other" address.

See **Screen 2.3.1** for address type information.

If selected as "Temporary" then the user has the option to give an "until when" date.

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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LOG OUT

Individual: John Smith

Smith Household  
425 Western Ave, Sunnyvale

John Smith  
Head

Keri Brown  
Spouse

Jack Smith  
Child

General Profile

Contact Info

Groups

Comments

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Attributes

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	Home Phone
Current Work	2810 Coleman Avenue			

Address Information

Address Type: Current Work

Until: mm/dd/yyyy

Address 1: 2810 Coleman Avenue

Address 2:

City, State, Postal Code: City - State - Postal Code

Delete Update Cancel

Other Contact Information

Contact Type	Value
AIM Screen Name	jsmith48421
Facebook ID	28410241
Twitter Account Name	john_smith_4_17
Yahoo! Messenger Name	jsmith1231

Primary Mailing Address  
Current Home (425 Western Avenue)

Stewardship Receipt Address  
Current Work (401 El Camino Real)

Contact Preferences

- Okay to Mail
- Okay to Email
- NOT Okay to Telephone

to Screen 2.2.1

to Screen 2.4.1

to Screen 2.5

to Screen 2.6

to Screen 2.9

to Screen 2.3.2


to Screen 2.3.3

to Screen 2.3.5

to Screen 2.3.6

to Screen 2.3.7

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768 px

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

+240 px

## +240 px

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.

Individual: John Smith

**Smith Household**  
425 Western Ave, Sunnyvale

**John Smith**  
*Head*

**Keri Brown**  
*Spouse*

**Jack Smith**  
*Child*

- to Screen 2.2.1 General Profile
- Contact Info**
- to Screen 2.4.1 Groups
- to Screen 2.5 Comments
- to Screen 2.6 Stewardship
- to Screen 2.9 Attributes

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

**Edit Email Address**

**Email Information**

Primary? No

Email Address: john.smith@gmail.com

Delete Update Cancel

[set as primary]	Home	408-281-2381	[set as primary]	jsmith1231@yahoo.com
[set as primary]	Mobile	415-552-9138	[set as primary]	john.f.smith@company.org
[set as primary]	Work	650-228-1248		
[set as primary]	Work	650-228-1200		
[set as primary]	Other	626-291-2481		

Other Contact Information

Contact Type	Value
AIM Screen Name	jsmith48421
Facebook ID	28410241
Twitter Account Name	john_smith_4_17
Yahoo! Messenger Name	jsmith1231

**Primary Mailing Address**  
Current Home (425 Western Avenue)

**Stewardship Receipt Address**  
Current Work (401 El Camino Real)

**Contact Preferences**

- Okay to Mail
- Okay to Email
- NOT Okay to Telephone



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 individual.

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 2.2.1.

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

PEOPLEHOUSEHOLDSGROUPSCOMMUNICATIONSADMINISTRATIONLOG OUT

Individual: John Smith

Smith Household  
425 Western Ave, Sunnyvale

John Smith  
Head

Keri Brown  
Spouse

Jack Smith  
Child

General ProfileContact InfoGroupsCommentsStewardshipAttributes

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

[set as primary]	Home	408-281-2381	[set as primary]	jsmith1231@yahoo.com
[set as primary]	Mobile	415-552-9138	[set as primary]	john.f.smith@company.org
[set as primary]	Work	650-228-1248		
[set as primary]	Work	650-228-1200		
[set as primary]	Other	626-291-2481		

Other Contact Information

Contact Type	Value
AIM Screen Name	jsmith48421
Facebook ID	28410241
Twitter Account Name	john_smith_4_17
Yahoo! Messenger Name	jsmith1231

Primary Mailing Address  
Current Home (425 Western Avenue)

Stewardship Receipt Address  
Current Work (401 El Camino Real)

Contact Preferences

- Okay to Mail
- Okay to Email
- NOT Okay to Telephone

to Screen 2.2.1

to Screen 2.4.1

to Screen 2.5

to Screen 2.6

to Screen 2.9

to Screen 2.3.2


to Screen 2.3.3

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ALCF

ALCF Church Management System

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View Change Log

+240 px



## Edit an Individual – Contact Preferences

This dialog box allows the user specify the "contact preferences" for this individual.

"Address" dropdowns can be:

- Current Home
- Current Work
- Any "Other" addresses defined for the individual
- Any "Temporary" addresses defined for the individual
- None

"Okay to ..." dropdowns can be:

- Yes
- No

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

PEOPLEHOUSEHOLDSGROUPSCOMMUNICATIONSADMINISTRATIONLOG OUT

Individual: John Smith

Smith Household  
425 Western Ave, Sunnyvale

John Smith  
Head

Keri Brown  
Spouse

Jack Smith  
Child

to Screen 2.2.1  
General Profile

to Screen 2.4.1  
Contact Info

to Screen 2.4.1  
Groups

to Screen 2.5  
Comments

to Screen 2.6  
Stewardship

to Screen 2.9  
Attributes

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

to Screen 2.3.2  
Add New

to Screen 2.3.3  
Add New

to Screen 2.3.5  
Add New

to Screen 2.3.6  
Add New

to Screen 2.3.7  
Edit

Other Contact Information

Contact Type	Value
AIM Screen Name	jsmith48421
Facebook ID	28410241
Twitter Account Name	john_smith_4_17
Yahoo! Messenger Name	jsmith1231

to Screen 2.3.6  
Add New

to Screen 2.3.7  
Edit

Edit Contact Preferences

Contact Preferences

Primary Mailing Address:

Current Home (425 Western)

Stewardship Receipts Address:

Current Work (4901 El Camino)

Okay to Mail:

Yes

Okay to Email:

Yes

Okay to Telephone:

No

Update

Cancel

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 on **Screen 2.4.3**.

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LOG OUT

## Individual: John Smith

**Smith Household**  
425 Western Ave, Sunnyvale

**John Smith**  
*Head*

**Keri Brown**  
*Spouse*

**Jack Smith**  
*Child*

to Screen 2.2.1

General Profile

to Screen 2.3.1

Contact Info

Groups

to Screen 2.5

Comments

to Screen 2.6

Stewardship

to Screen 2.9

Attributes

to Screen 2.4.2

Add New

### Ministry Participation

Ministry	Role	Dates of Involvement
<a href="#">Safari Kids</a>	Volunteer	April 2009 - Present May 2007 - September 2008
<a href="#">Growth Groups &gt; Mountain View 2</a>	Participant	January 4, 2004 - Present
<a href="#">Real World Young Adults</a>	Small Group Leader	September 24, 2007 - May 2008

### Communication Lists

to Screen 2.4.4

Add New

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

Edit Individual — Ministry Participation (Add)

This dialog box is to be used when creating a new ministry participation.

## Individual: John Smith

**Smith Household**  
425 Western Ave, Sunnyvale

**John Smith**  
Head

**Keri Brown**  
Spouse

**Jack Smith**  
Child

to Screen 2.2.1

General Profile

to Screen 2.3.1

Contact Info

Groups

to Screen 2.5

Comments

to Screen 2.6

Stewardship

to Screen 2.9

Attributes

## Ministry Participation

to Screen 2.4.2

Add New

Ministry

Role

Dates of Involvement

### Add Ministry Participation for "John Smith"

Ministry: Worship Arts

Refresh List

refreshes table below

Group Name

Type

Choir

Category

> [Celebration Choir](#)

Regular Group

> [Gospel Choir](#)

Regular Group

Easter Production 2009

Category

> [Easter 2009 Cast](#)

Regular Group

> [Easter 2009 Costumes](#)

Regular Group

> [Easter 2009 Crew](#)

Regular Group

Easter Production 2010

Category

> [Easter 2010 Cast](#)

Regular Group

> [Easter 2010 Costumes](#)

Regular Group

> [Easter 2010 Crew](#)

Regular Group

[Worship Team](#)

Regular Group

Cancel

Clicking on any Group for groups that can have members explicitly assigned to it (e.g. regular groups, growth groups and ad hoc groups) will take the user to **Screen 2.4.3**. For groups that can not have members explicitly assigned to it (e.g. smart groups and category groups), a pop up error message will be displayed explaining why.

Clicking on Cancel will close the dialog box, essentially taking the user to **Screen 2.4.1**.

Edit Individual — Ministry Participation

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

PEOPLEHOUSEHOLDSGROUPSCOMMUNICATIONSADMINISTRATIONLOG OUT

Individual: John Smith

Smith Household  
425 Western Ave, Sunnyvale

John Smith  
Head

Keri Brown  
Spouse

Jack Smith  
Child

to Screen 2.2.1  
General Profile

to Screen 2.3.1  
Contact Info

Groups

to Screen 2.5  
Comments

to Screen 2.6  
Stewardship

to Screen 2.9  
Attributes

to Screen 2.4.2  
Add New

Ministry Participation Status

Current Roles:

Member

Host

Add a New Role

Role	Participation Started	Participation Ended
Host	<u>Jul 23, 2009</u>	<u>Enter a Date</u>
Member	<u>Sep 18, 2008</u>	<u>Enter a Date</u>
	<u>Dec 4, 2007</u>	<u>Feb 28, 2008</u>
	<u>Jun 4, 2007</u>	<u>Aug 31, 2007</u>

Edit a Participation Period

Role:

Host

Membership Started:

Jul 23, 2009

Membership Ended:

mm/dd/yyyy


Okay

Update

Cancel

This "Edit a Participation Period" or "Add a New Role" subsection will only appear after the button or link is clicked. When "Editing", Role will be grayed-out. When "Adding", only roles that aren't currently active roles will be available for selection. Roles and Participation Start Date are required. Participation End Date is optional.

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ALCF

Following the vision of Jesus Christ

768 px

Record last updated on **February 23, 2009** by Doris Cohen

View Change Log

+240 px

Edit Individual — Communication List

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

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## Individual: John Smith

**Smith Household**  
425 Western Ave, Sunnyvale

**John Smith**  
*Head*

**Keri Brown**  
*Spouse*

**Jack Smith**  
*Child*

to Screen 2.2.1

General Profile

to Screen 2.3.1

Contact Info

Groups

to Screen 2.5

Comments

to Screen 2.6

Stewardship

to Screen 2.9

Attributes

### Ministry Participation

to Screen 2.4.2

Add New

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

#### Subscribe Individual to a Communication List

Communication List: Super Fun Social Committee ▼

Subscribe

Cancel

to Screen 2.4.4

Add New

View an Individual – Comments

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 leaders

List of categories can be edited by the ChMS Administrator and will include categories like:

- Membership
- Ministry Involvement
- Benevolence
- Other

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

"Privacy Level" 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 2.5.1**

Individual: John Smith

Smith Household  
425 Western Ave, Sunnyvale

John Smith  
Head

Keri Brown  
Spouse

Jack Smith  
Child

to Screen 2.2.1

General Profile

to Screen 2.3.1

Contact Info

to Screen 2.4.1

Groups

Comments

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Stewardship

to Screen 2.9

Attributes

to Screen 2.5.1

Add New

Comments and Notes

Filter by Posted By:

- View All -

Filter by Privacy Level:

- View All -

Filter by Category:

- View All -

Edit	Posted By	Date	Privacy Level	Category	Comment
[Edit]	Dixie Campbell	2002-01-24	Staff	Benevolence	Vivamus justo. Curabitur nec elit at justo mollis sollicitudin.
[Edit]	Alyssa McNamara	2003-01-20	General	Benevolence	Nulla facilisi. Suspendisse potenti. Phasellus augue. Suspendisse pharetra.
[Edit]	Hester McDonnell	2003-07-22	Confidential	Membership	Pellentesque eu sem. Proin nec nunc in magna placerat tincidunt. Sed iaculis ligula sit amet nulla. Vivamus.
[Edit]	Clark Parker	2004-05-17	Staff	Ministry Involvement	Ut vitae turpis. Praesent sem nisi, malesuada et, blandit quis, consectetur a, nisl. Nunc ante nisl, fringilla id, rhoncus ut, laoreet at, orci. Aenean eget magna eget massa congue egestas. Aenean eget magna eget massa.
[Edit]	Delbert Kim	2004-08-16	General	Ministry Involvement	Donec vel orci. Nulla iaculis, tortor non tristique tempus.
[Edit]	August McDermott	2005-06-10	Confidential	Membership	Aliquam vitae libero. Proin venenatis nisl nec eros. Nulla aliquet tincidunt risus. Pellentesque vitae arcu. Ut elementum dapibus lacus. Vestibulum et est in nibh porttitor interdum. Curabitur in neque. Sed egestas. Aliquam ultricies accumsan urna. Aenean suscipit metus.
[Edit]	Wayne Bailey	2007-11-13	Confidential	Benevolence	In euismod massa condimentum nisi. Nullam nec urna ac mi hendrerit tempus. Aliquam vitae libero. Vestibulum arcu purus, sollicitudin hendrerit, pharetra in, accumsan ac, ipsum. Praesent a dui non velit eleifend euismod. Aliquam tortor. Vestibulum tincidunt nisl sit amet nulla.
[Edit]	Chuck Higgins	2009-07-04	Staff	Benevolence	Aenean eget magna eget massa congue egestas. Duis facilisis, ante non vehicula venenatis, risus lacus sagittis arcu, ut pretium turpis nunc ut tellus.
[Edit]	Lilybell Parker	2009-10-20	General	Benevolence	Quisque at odio. Ut vitae turpis. Proin pretium cursus ipsum. Proin tempor. Donec et augue. Quisque at ligula sit amet tellus hendrerit dictum. Suspendisse potenti. Cras sit amet tortor vitae purus ultricies feugiat. Maecenas sed urna. Aenean purus. Ut.
[Edit]	Fran Donnelly	2009-11-30	Confidential	Other	Aliquam vitae libero. Sed nec augue et turpis tincidunt accumsan. Quisque at ligula sit amet.



Edit an Individual – Comments

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

A user can only edit his/her own comment.

**Privacy Level** dropdown is limited to the comment types that the user is allowed to see. See Screen 2.5 for more information on **Privacy Level** as well as **Category**.

After hitting Save or Cancel, the user is taken back to **Screen 2.5**.

PEOPLEHOUSEHOLDSGROUPSCOMMUNICATIONSADMINISTRATIONLOG OUT

Individual: John Smith

Smith Household  
425 Western Ave, Sunnyvale

John Smith  
Head

Keri Brown  
Spouse

Jack Smith  
Child

General Profile

Contact Info

Groups

Comments

Stewardship

Attributes

to Screen 2.2.1

to Screen 2.3.1

to Screen 2.4.1

to Screen 2.6

to Screen 2.9

to Screen 2.5.1  
Add New

Filter by Posted By:

Filter by Privacy Level:

Filter by Category:

Add a Comment for John Smith

Privacy Level: Staff

Category: Benevolence

Comment: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Quisque tristique massa non tortor vulputate vitae cursus leo sollicitudin. Sed orci justo, porta id blandit nec, pulvinar in libero. Ut elit lacus, aliquet sit amet tincidunt at, sagittis et quam. Proin dictum faucibus nunc quis aliquam. Sed quis justo nisi, id adipiscing metus. Nunc laoreet, orci eu dictum sagittis, enim libero fringilla velit, sed eleifend dolor elit vitae ligula. Aenean

Save

Cancel

[Edit] August McDerrott2009-06-16ConfidentialMembership

[Edit] Wayne Bailey2007-11-13ConfidentialBenevolence

[Edit] Chuck Higgins2009-07-04StaffBenevolence

[Edit] Lilybell Parker2009-10-20GeneralBenevolence

[Edit] Fran Donnelly2009-11-30ConfidentialOther

Curabitur nec elit at justo mollis

uspendisse potenti. Phasellus augue. Pharetra.

u sem. Proin nec nunc in magna nunc. Sed iaculis ligula sit amet nulla.

Praesent sem nisi, malesuada et, consectetur a, nisl. Nunc ante nisl, lacus ut, laoreet at, orci. Aenean eget massa congue egestas. Aenean eget massa.

Nulla iaculis, tortor non tristique

bero. Proin venenatis nisl nec eros. tincidunt risus. Pellentesque vitae arcu. dapibus lacus. Vestibulum et est in nibh porttitor interdum. Curabitur in neque. Sed egestas. Aliquam ultricies accumsan urna. Aenean suscipit metus.

In euismod massa condimentum nisi. Nullam nec urna ac mi hendrerit tempus. Aliquam vitae libero. Vestibulum arcu purus, sollicitudin hendrerit, pharetra in, accumsan ac, ipsum. Praesent a dui non velit eleifend euismod. Aliquam tortor. Vestibulum tincidunt nisl sit amet nulla.

Aenean eget magna eget massa congue egestas. Duis facilisis, ante non vehicula venenatis, risus lacus sagittis arcu, ut pretium turpis nunc ut tellus.

Quisque at odio. Ut vitae turpis. Proin pretium cursus ipsum. Proin tempor. Donec et augue. Quisque at ligula sit amet tellus hendrerit dictum. Suspendisse potenti. Cras sit amet tortor vitae purus ultricies feugiat. Maecenas sed urna. Aenean purus. Ut.

Aliquam vitae libero. Sed nec augue et turpis tincidunt accumsan. Quisque at ligula sit amet.

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

## 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 2.2** 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 tax-deductible 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)?

## Individual: John Smith

**Smith Household**  
425 Western Ave, Sunnyvale

**John Smith**  
Head

**Keri Brown**  
Spouse

**Jack Smith**  
Child

to Screen 2.2.1

General Profile

to Screen 2.3.1

Contact Info

to Screen 2.4.1

Groups

to Screen 2.5

Comments

**Stewardship**

to Screen 2.9

Attributes

### Stewardship

Prints a report of the list of transaction entries given the specified filtering criteria.

Print Report

to Screen 2.6.1

Add New

Date Range:

- View All -

Filter by Fund:

- View All -

Filter by Transaction Type:

- View All -

View Entire Household:

☒ View contributions by all household members

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

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.

Individual: John Smith

Smith Household  
425 Western Ave, Sunnyvale

John Smith  
Head

Keri Brown  
Spouse

Jack Smith  
Child

Stewardship

Prints a report of the list of transaction entries given the specified filtering criteria.

Print Report

to Screen 2.6.1  
Add New

Date Range:

Filter by Fund:

Filter by Transaction Type:

View Entire Household:

☒ View contributions by all household members

Add a New Stewardship Transaction

By: John Smith

Fund: Scholarship

2010 Marriage Retreat

Transaction: Check

Check #

Amount: \$241.50

Comment:

Save

Cancel

	Contributed	Cleared
2006-09-22 Keri Brown Support > Keith Blackford Check #2462	\$31.01	\$25.00
2008-03-07 Keri Brown Ministry > Safari Kids Stock Donation	\$333.89	\$333.89
2008-11-28 Jack Smith Scholarship > 2009 Ninja Camp Check #2498	\$976.54	\$976.54
2008-12-29 Keri Brown Ministry > Student Ministries Corp. Match (Pre-Tax)	\$995.02	\$945.28
2009-03-29 Jack Smith Tithes/Offering Credit Card (Online)	\$763.91	\$763.91
	\$409.72	\$409.72
	\$260.54	\$260.54
	\$994.58	\$994.58
	\$802.85	\$802.85
	\$307.21	\$307.21
	\$555.35	\$555.35
	\$268.17	\$244.25
	\$742.62	\$742.62
	\$778.54	\$778.54
	\$274.73	\$251.23
	\$733.11	\$733.11
	\$473.41	\$473.41
	\$982.38	\$982.38
	\$502.22	\$502.22
	\$270.53	\$250.23

Merge Individuals, Find

The first step in merging two individuals records together is to find the individual record to merge with. This screen is for the user to select the individual to merge with.

Suggested individuals (based on common names, contact information, etc.) is up top. "Search All" type functionality is below.

Clicking on any name will redirect the user to Screen 2.7.1.

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT
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Merge Individuals: "John Smith"

John Smith Household, 241 Main Street, Sunnyvale

Please select an Individual record to merge with "John Smith". The system suggests the following Individuals, or you can search for a different individual below.

First Name	LAST NAME v	Membership Status	Address	City
<a href="#">Jonathan</a>	<a href="#">Bubba-Smith</a>	Non-Member	41098 Mill Valley Way	Anderson
<a href="#">Joe</a>	<a href="#">Smith</a>	Non-Member	1040 La Canada Flintridge Dr.	Hercules
<a href="#">Jon</a>	<a href="#">Smith</a>	Non-Member/Tithe	76207 Walnut Ave.	Irwindale
<a href="#">Jonna</a>	<a href="#">Smith</a>	Non-Member	31558 Kerman Blvd.	East Palo Alto

Search / Filter List

First Name

Last Name

- View All Statuses -

Refresh List

refreshes table below

Results: Viewing people 1-20 of 2141.

[Previous](#) | [Next](#)

First Name	LAST NAME v	Membership Status	Address	City
<a href="#">Page</a>	<a href="#">Alexander</a>	Non-Member	41098 Mill Valley Way	Anderson
<a href="#">Silvanus</a>	<a href="#">Barry</a>	Non-Member	1040 La Canada Flintridge Dr.	Hercules
<a href="#">Susy</a>	<a href="#">Barry</a>	Non-Member/Tithe	76207 Walnut Ave.	Irwindale
<a href="#">Walden</a>	<a href="#">Barry</a>	Non-Member	31558 Kerman Blvd.	East Palo Alto
<a href="#">Benedict</a>	<a href="#">Bennett</a>	Member	30811 Palm Springs Road	Bell
<a href="#">Dandy</a>	<a href="#">Brooks</a>	Member	88436 Mountain View Road	Commerce
<a href="#">Burleigh</a>	<a href="#">Buckley</a>	Non-Member	54019 Industry Ave.	Capitola
<a href="#">Bass</a>	<a href="#">Burke</a>	Non-Member/Tithe	59216 Reedley Dr.	Antioch
<a href="#">Amorita</a>	<a href="#">Chang</a>	Member	30200 Elk Grove St.	Agoura Hills
<a href="#">Worthington</a>	<a href="#">Coleman</a>	Non-Member/Tithe	25835 Emeryville Blvd.	Hillsborough
<a href="#">Lula</a>	<a href="#">Collins</a>	Non-Member	80939 Canyon Lake Dr.	Colton
<a href="#">Minna</a>	<a href="#">Cook</a>	Member	2279 Sonora Road	Lakeport
<a href="#">Tilda</a>	<a href="#">Cullen</a>	Non-Member	83531 Chico Blvd.	Biggs
<a href="#">Russell</a>	<a href="#">Cunningham</a>	Member	54957 Hughson Way	Laguna Niguel
<a href="#">Abbie</a>	<a href="#">Davis</a>	Non-Member/Tithe	56850 El Cajon Road	West Sacramento
<a href="#">Martie</a>	<a href="#">Davis</a>	Non-Member/Tithe	33924 Fullerton St.	La Mesa
<a href="#">Toinette</a>	<a href="#">Davis</a>	Member	41077 Dorris Dr.	Truckee
<a href="#">Bowie</a>	<a href="#">Doherty</a>	Non-Member	37431 Santa Monica St.	Salinas
<a href="#">Griz</a>	<a href="#">Donnelly</a>	Non-Member/Tithe	65033 Cudahy Blvd.	Blythe

Merge Individuals, Reconcile Data

The second step in merging two individuals records together is to reconcile all disparate pieces of data for both individuals. The system will automatically include any data points that are the same on both individual records. For any data points that are different, the user will need to manually select which record is the "right" one, if any.

Note that comments, stewardship data, group and communications list membership, email addresses, and other contact info (e.g. AIM, Twitter, etc.) will automatically be merged, saving all non-duplicate records.

**TODO:** Other things to consider include Name, stewardship data, group/ministry participation, contact lists, etc.

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT
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## Merge Individuals: "John Smith"

**Jonathan Smith**  
202 Long Drive, San Francisco

**John Smith**  
202 Longg Street, San Francisco

### Households

☒ 202 Long Drive, San Francisco  
with Karen Jones-Smith, Samantha Jones-Smith

☐ 202 Longg Street, San Francisco  
with Karen Smith

### Addresses

☒ Current Work  
2180 Salley Street, Mountain View

☐ Previous Work  
122 Main St, Palo Alto

☒ Previous Work  
122 Main Avenue, Palo Alto

### Phone

☒ Mobile - (415) 555-1212

☐ Mobile - (415) 551-5121

☒ Work - (415) 555-1234

### Membership, Family, Biographical

☐ Married

☒ Married to Karen Smith since 1/21/2004

☒ Birthday: Feb 11, 1977

☐ Birthday: Feb 11

☒ Member since July 2, 2008

☐ Non-Member

Merge

Cancel



Edit Individual, Join a Household

This screen is to select or create a new household for this individual to join.

## Join a Household: “John Smith”

### Home Address

Address 1: 425 Western Ave.

Address 2:

City, State, Postal Code:

Primary Home Phone: 650-555-1212

Alternate Home Phone: 650-824-1241

Alternate Home Phone: 650-555-1234

Add Another

Next

Cancel

Next takes the user to Screen 2.8.1  
Cancel takes the user back to the appropriate Screen 2.2.x.



Edit Individual, Join a Household, Ensure  
Unique

The system will attempt to find any similar/close  
matches to the home address and phone  
information provided from **Screen 2.8**, and will  
display "close matches" to the user in order to  
minimize duplicates.

Clicking on any of the links will associate this  
person as a member of the household selected and  
will take the user to **Screen 3.2** for the household.

Clicking on **None Found...** will create the new  
household entry and take the user to **Screen 3.2** for  
the new household.

Clicking on **Back** will take the user back to **Screen  
2.8** with the existing data typed in.

Clicking on **Cancel** will take the user back to the  
appropriate **Screen 2.2.x**.

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT
--------	------------	--------	----------------	----------------	---------

## Join a Household: "John Smith"

425 Western Ave., Sunnyvale, CA 94048

Does the household match any of the already-existing households listed below? And are the members of that household in the same family unit as John Smith?  
If so, please select the household that it matches.

Otherwise, click on "**None Found – Create as a New Household**" below.

Please remember that roommates should not and are not considered in the same household.

HOUSEHOLD NAME v	Address	City	Members
<a href="#">Allen Household</a>	46618 Port Hueneme Way	Rosemead	Bird Allen, Christy Allen
<a href="#">Anderson Household</a>	44619 Burbank Dr.	Lynwood	Silvester Anderson, Tonie Anderson
<a href="#">Bell Household</a>	22326 Kerman Road	Vista	Shirl Bell, Idaline Bell
<a href="#">Bell Household</a>	52680 Gilroy Road	Mendota	Adalia Bell, Narda Bell, Halsey Bell, Ivar Bell
<a href="#">Brennan Household</a>	37987 Redding Ave.	El Cajon	Cyril Brennan, Roderick Brennan
<a href="#">Browne Household</a>	37956 Firebaugh Ave.	Culver City	Delia Browne, Bram Browne, Cleopatra Browne, Berton Browne
<a href="#">Bryant Household</a>	4005 Lakeport Dr.	Laguna Niguel	Bethany Bryant, Dominique Bryant, Pierce Bryant, Jessy Bryant
<a href="#">Burke - Individual</a>	52229 Moraga Road	Fremont	Sandy Burke

None Found – Create as a New Household

Back

Cancel

View an Individual – Attributes

Attributes are any other fields that ministries or other users may want to track for an individual, including things like:

- Date Accepted Christ
- Date of Baptism
- Spiritual Gifts
- Vocational Gifts
- Baptized at ALCF?
- Previous Church Membership
- etc.

Each attribute can only be entered in once. But attributes can be edited.

Attribute "Types" include:

- Date
- Date w/ Year Optional
- Strict Dropdown (Single-Select)
- Flexible Dropdown (Single-Select)
- Strict Dropdown (Multiple-Select)
- Flexible Dropdown (Multiple-Select)
- Text
- Checkbox (e.g. a simple "Yes" or "No")

The system is intended to be completely extensible -- new attribute fields can be added relatively easily by the ChMS Administrator.

Any of the **Edit** buttons will take the user to **Screen 2.9.1**.

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT
--------	------------	--------	----------------	----------------	---------

Individual: John Smith

**Smith Household**  
425 Western Ave, Sunnyvale

**John Smith**  
*Head*

**Keri Brown**  
*Spouse*

**Jack Smith**  
*Child*

- to Screen 2.2.1  
General Profile
- to Screen 2.3.1  
Contact Info
- to Screen 2.4.1  
Groups
- to Screen 2.5  
Comments
- to Screen 2.6  
Stewardship
- Attributes**

to Screen 2.9.2  
Add a New Attribute

Attributes

**Date Accepted Christ:** January 1997  
Edit

**Spiritual Gifts:** Healing, Prayer  
Edit

**Ministry Consultation Guide:** Chris Warren  
Edit

**Ministry Consultation Date:** February 5, 2005  
Edit

The exact layout of this dialog box is dependent on the type of attribute that is being edited. E.g. if the type of attribute is a "Text" attribute, then this dialog box will have a textbox instead of a date selector.

Both **Save** and **Cancel** will close the dialog box, essentially taking the user to **Screen 2.9..**

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT
--------	------------	--------	----------------	----------------	---------

Individual: John Smith

Smith Household  
425 Western Ave, Sunnyvale

John Smith  
Head

Keri Brown  
Spouse

Jack Smith  
Child

to Screen 2.2.1  
General Profile

to Screen 2.3.1  
Contact Info

to Screen 2.4.1  
Groups

to Screen 2.5  
Comments

to Screen 2.6  
Stewardship

Attributes

to Screen 2.9.2  
Add a New Attribute

Attributes

Mini

Ministry Consultation Date: February 5, 2005

Edit

Ministry Consultation Date: 2/5/2005

Calendar Icon

Save

Cancel

The list of available attributes is managed by a ChMS Administrator – see **Screen 2.9** for more notes on other attributes.

After selecting an Attribute, the user is taken to **Screen 2.9.1** for that attribute.

**Cancel** will close the dialog box, essentially taking the user to **Screen 2.9**.

## Individual: John Smith

**Smith Household**  
425 Western Ave, Sunnyvale

**John Smith**  
*Head*

**Keri Brown**  
*Spouse*

**Jack Smith**  
*Child*

to Screen 2.2.1

General Profile

to Screen 2.3.1

Contact Info

to Screen 2.4.1

Groups

to Screen 2.5

Comments

to Screen 2.6

Stewardship

Attributes

to Screen 2.9.2

Add a New Attribute

### Attributes

#### Add an Attribute to John Smith

Select Attribute:

Select

Cancel

Mini

Ministry Consultation Date: February 5, 2005

Edit

Search for a Household

This allows the user to search for an a specific household in the ChMS.

A household is a family unit that lives in the same address.

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 may be part of multiple households.

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

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 2141. [Previous](#) | [Next](#)

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



View Household

See **Screen 2.2** on the explanation of positions within rules for a household.

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 **Screen 2.2** for that individual.

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

PEOPLE

HOUSEHOLDS

GROUPS

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ADMINISTRATION

LOG OUT

Household: John Smith Household

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

Household Members

to Screen 3.3

Edit Roles

Role	Name	Email	Phone
Head	<a href="#">John Smith</a>	<a href="mailto:jsmith@gmail.com">jsmith@gmail.com</a>	415-555-1212
Spouse	<a href="#">Keri Brown</a>	<a href="mailto:kbrown@gmail.com">kbrown@gmail.com</a>	415-555-2211
Child	<a href="#">Jack Smith</a>		

Home Address and Phone for the John Smith Household

to Screen 3.4

Add New

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

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

Combine Households

PEOPLE

HOUSEHOLDS

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LOG OUT

102

## Household: John Smith Household

### Household Members

to Screen 3.3

Edit Roles

Role	Name	Email	Phone
Head	John Smith		
Spouse	Karen Smith		
Child	Jacob Smith		

### Home Address and Phone

3.4

Current	Address	City	Zip	Phone
Current Home	423 Main Street	Palo Alto, CA	94011	650-555-1212
[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

Save

Cancel

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

Combine Households

PEOPLE

HOUSEHOLDS

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LOG OUT

102

## Household: John Smith Household

### Household Members

Role

Head

Spouse

Child

### Home Address

Current

Current Home

[set as current]

[set as current]

### Edit Household – Home Address and Phone

#### Home Address

Current/Previous: Current Home Address ▼

Address 1: 425 Western Ave.

Address 2:

City, State, Postal Code: City - State - Postal Code

Primary?

Primary Home Phone: 650-555-1212 ☒

Alternate Home Phone: 650-824-1241 ☐

Alternate Home Phone: 650-555-1234 ☐

Add Another

Update

Cancel

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

Combine Households

PEOPLE

HOUSEHOLDS

GROUPS

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LOG OUT

102

## Household: John Smith Household

### Household Members

Role

Head

Spouse

Child

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

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**)

### Home Address

Current

Current Home

[set as current]

[set as current]

### Edit Household – Add Individual

#### Role in Household

Head of Household? No

#### Name Information

Title: - None -

First Name: Patrick

Middle Name or Initial:

Last Name: Smith

Suffix: - None -

Goes By:

To be used for emails, mailings, etc.  
If left blank, "Patrick Smith" will be used.

#### Biographical Information

Date of Birth: mm/dd/yyyy

Gender: Male

Next

Cancel

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

Combine Households

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 user will be taken back to Screen 3.2.

"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.

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT
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Household: John Smith Household

Household Members

Role

Head

Spouse

Child

Edit Household – Add Individual

Matched Individuals

Select	First Name	Last Name	Address	Birthdate
Select	Patrick	Smith	425 Western Ave	Feb 2
Select	Pat	Brown-Smith	285 Maple Drive, Apt. #3	Mar 9, 1977
Select	Patrick	Smithton	1802 Pasqualito Drive	n/a

Back

Create Patrick Smith as a New Individual

Cancel

Home Address and Phone for the John Smith Household

to Screen 3.4

Add New

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

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

Combine Households



See note in the dialog box about which individuals can be removed.

Note that if an individual to be removed does not have any other household, then a dialog box warning/confirmation will appear after this confirming that the individual will no longer have any household data associated with him/her.

Household: John Smith Household

Household Members

to Screen 3.3  
Edit Roles

Role	Name	Email	Phone
Head	John Smith		
Spouse	Karen Smith		
Child	Jack Smith		

Home Address and Phone

Current	Address	City	Zip	Phone
Current Home	423 Main Street	Palo Alto, CA	94011	650-555-1212
[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

Remove an Individual

Note that only non-head household members that are already part of another household can be removed (for example, a child that is already part of another household).

Individual to Remove: Jack Smith

Remove Cancel

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  
Combine Households

## Edit Household – Split Households

This will cause the current household to be split into two separate households.

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 from this household.

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".

PEOPLE

HOUSEHOLDS

GROUPS

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102

## Household: John Smith Household

### Household Members

Role

Head

Spouse

Child

### Home Address

Current

Current Home

[set as current]

[set as current]

### Split This Household

Household Members to Split:

☐ John Smith

☒ Keri Brown

☐ Jack Smith

Head of New Household:

Keri Brown

### New Household's Home Address Info

Address 1: 425 Western Ave.

Address 2:

City, State, Postal Code:

City

- State -

Postal Code

Primary Home Phone: 650-555-1212

Primary?



Alternate Home Phone: 650-824-1241



Alternate Home Phone: 650-555-1234



Add Another

Split

Cancel

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

Combine Households

## Edit Household – Combine Households

This allow two households to be combined, e.g. due to a marriage or changed family/living arrangement. The two households will be combined into a single, combined household.

Note that this should be specifically used when two actual households are being combined in real life. This is **not** to be used to attempt to merge/fix duplicate household records in the database. To merge/fix duplicate records, that should be done at the individual level. See **Screen 2.7** for more on this.

Any matching "previous home address" data will be combined together. Any non-matching "previous home address" data will be reassigned to the individual instead of the household. The "current home address" information will become a "previous home address" for each individual in the household being merged in.

After hitting **"Merge"**, the dialog box will close, redirecting the user to **Screen 3.2** for the combined household. If there is any old "Recently Split from..." messaging on either household, that will no longer appear.

The only available choices are the Head of either merged household.

PEOPLE

HOUSEHOLDS

GROUPS

COMMUNICATIONS

ADMINISTRATION

LOG OUT

102

## Household: John Smith Household

### Household

Role

Head

Spouse

Child

### Home Address

Current

Current Home

[set as current]

[set as current]

### Combine Households

#### Search for a Household to Combine

Name: Carl Smith

Address: 425 Western Ave.

	Household Name	Address	City	Members
<input checked="" type="radio"/>	<u>Allen Household</u>	46618 Port Hueneme Way	Rosemead	Bird Allen, Christy Allen
<input type="radio"/>	<u>Anderson Household</u>	44619 Burbank Dr.	Lynwood	Silvester Anderson, Tonie Anderson
<input type="radio"/>	<u>Bell Household</u>	22326 Kerman Road	Vista	Shirl Bell, Idaline Bell
<input type="radio"/>	<u>Bell Household</u>	52680 Gilroy Road	Mendota	Adalia Bell, Narda Bell, Halsey Bell, Ivar Bell
<input type="radio"/>	<u>Brennan Household</u>	37987 Redding Ave.	El Cajon	Cyril Brennan, Roderick Brennan

Head of Combined Household:

John Smith

Combine

Cancel

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

Combine Households

## View Groups – Example for Worship Arts

Groups provide the ability to organize individuals into groups or organizational units. Groups can either be for specific tasks or events (e.g. "Worship Team", "Marriage Retreat 2010 Attendee", etc.), or they can be a ministry in and of itself (e.g. "OASIS", "Real World", etc.).

Groups must belong to at least one or more ministry which oversees the management of the group.

Groups can have an email alias (e.g. [realworld@groups.alcf.net](mailto:realworld@groups.alcf.net)) as well as one or more individuals (e.g. staff member, lay leader, etc.) who moderates and manages the email alias. Email options for each group can be one of the following:

- \* **Announce Only** – only moderators and users affiliated with this ministry is allowed to send messages to this list
- \* **Private List** – only members of the group can send messages to the list
- \* **Public List** – anyone can send messages to the list

These are the following "Types" of groups:

- \* **Ad Hoc** – these are self-service groups that need to be further-defined.

- \* **Category** – see below for more information

- \* **Growth** – these are Growth Groups, which has a host, a facilitator, and a structure type (e.g. Young Adult, Regular, Spanish Speaking, etc.)

- \* **Regular** – these groups are for everything else

- \* **Smart** – these groups cannot have individuals manually added or removed to it, but instead its membership is defined by rules (e.g. "any individual who is listed as a facilitator of a Growth Group")

To help with the organization of groups, groups can have a category, and categories can be nested.

Note that categories, in and of themselves, cannot have individual members assigned to it. However, categories can also have email aliases (e.g. [safarikids@groups.alcf.net](mailto:safarikids@groups.alcf.net)) where the message would be sent out to the distinct set of individuals who are part of any group that belongs to the "Safari Kids" category.

Normally, any groups that an individual is part of will be listed in the individual's profile page on **Screen 2.4.1**. However, if a specific group is marked as "Confidential", the individual's membership will NOT be made known to any user not affiliated with the ministry that the group is part of.

Any logged-in user can view the membership of any non-confidential group. For confidential groups, only users affiliated with the ministry of that group can view the membership.

Only users affiliated with the ministry of a group can edit the membership, name, categorization and other properties of a given group. They are also the only ones who can create new groups and view/edit roles for the ministry.

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT
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## View Groups in “Worship Arts”

Ministry: Worship Arts

Refresh List

refreshes table below

Group Name	Type	Email
<u>Choir</u>	Category	Announce Only – <a href="mailto:choir@groups.alcf.net">choir@groups.alcf.net</a>
> <u>Celebration Choir</u>	Regular Group	Announce Only – <a href="mailto:celebration.choir@groups.alcf.net">celebration.choir@groups.alcf.net</a>
> <u>Gospel Choir</u>	Regular Group	Announce Only – <a href="mailto:gospel.choir@groups.alcf.net">gospel.choir@groups.alcf.net</a>
<u>Easter Production 2009</u>	Category	Announce Only – <a href="mailto:easter-2009@groups.alcf.net">easter-2009@groups.alcf.net</a>
> <u>Easter 2009 Cast</u>	Regular Group	Announce Only – <a href="mailto:easter-2009-cast@groups.alcf.net">easter-2009-cast@groups.alcf.net</a>
> <u>Easter 2009 Costumes</u>	Regular Group	Announce Only – <a href="mailto:easter-2009-costumes@groups.alcf.net">easter-2009-costumes@groups.alcf.net</a>
> <u>Easter 2009 Crew</u>	Regular Group	Announce Only – <a href="mailto:easter-2009-crew@groups.alcf.net">easter-2009-crew@groups.alcf.net</a>
<u>Easter Production 2010</u>	Category	Announce Only – <a href="mailto:easter-2010@groups.alcf.net">easter-2010@groups.alcf.net</a>
> <u>Easter 2010 Cast</u>	Regular Group	Announce Only – <a href="mailto:easter-2010-cast@groups.alcf.net">easter-2010-cast@groups.alcf.net</a>
> <u>Easter 2010 Costumes</u>	Regular Group	Announce Only – <a href="mailto:easter-2010-costumes@groups.alcf.net">easter-2010-costumes@groups.alcf.net</a>
> <u>Easter 2010 Crew</u>	Regular Group	Announce Only – <a href="mailto:easter-2010-crew@groups.alcf.net">easter-2010-crew@groups.alcf.net</a>
<u>Worship Team</u>	Regular Group	Private List – <a href="mailto:worship-team@groups.alcf.net">worship-team@groups.alcf.net</a>

clicking on any item will take user to **Screen 4.2.1 ~ 4.2.5** (depending on the Group type)

This will take the user to a "blank" version of **Screen 4.2.1 ~ 4.2.5** (depending on the Group type)

Create a New Group for Type: Regular Group

Create

View Roles in Worship Arts

to Screen 4.5

## View Groups in “Growth Groups”

Ministry: 

Growth Groups

Refresh List

refreshes table below

Group Name	Type	Email
<u>Growth Groups</u>	Category	Announce Only – gg@groups.alcf.net
> <u>Peninsula</u>	Category	
> <u>San Francisco 01</u>	Regular Group	Private List – gg.sf01@groups.alcf.net
> <u>San Francisco 02</u>	Regular Group	Private List – gg.sf02@groups.alcf.net
> <u>South Bay</u>	Category	
> <u>Mountain View 01</u>	Regular Group	Private List – gg.mv01@groups.alcf.net
> <u>Palo Alto 01</u>	Regular Group	Private List – gg.pa01@groups.alcf.net
<u>Growth Group Facilitators</u>	Category	Announce Only – gg.fac@groups.alcf.net
> <u>Living Lessons Facilitators</u>	Smart Group	Announce Only – gg.fac.ll@groups.alcf.net
> <u>Regular Facilitators</u>	Smart Group	Announce Only – gg.fac.regular@groups.alcf.net
> <u>Young Adults Facilitators</u>	Smart Group	Private List – gg.fac.ya@groups.alcf.net
<u>Growth Group Hosts</u>	Smart Group	Private List – worship-team@groups.alcf.net

Create a New Group for Type:

Regular Group

Create

View Roles in Worship Arts

to Screen 4.5

This will take the user to a "blank"  
version of **Screen 4.2.1 ~ 4.2.5**  
(depending on the Group type)



View Group – type "Category"

Groups must be affiliated with at least one ministry.

If a group is affiliated with more than one ministry, it must be at the top-level (e.g. it must have a category of "none").

If the group is considered "Confidential", only users in affiliated ministries have access to this page for the confidential group. Moreover, the group will be marked as Confidential.

## Group Category “Growth Groups”

CONFIDENTIAL

only displayed if group is "Confidential"

Ministry: Growth Groups

Parent Category: none

Email List Preferences: Announce Only – [gg@groups.alcf.net](mailto:gg@groups.alcf.net)

to Screen 4.3.1

Edit

### Groups in this Category

Group Name	Type	Email
<u>Peninsula</u>	Category	none
> <u>San Francisco 01</u>	Regular Group	Private List – <a href="mailto:gg.sf01@groups.alcf.net">gg.sf01@groups.alcf.net</a>
> <u>San Francisco 02</u>	Regular Group	Private List – <a href="mailto:gg.sf02@groups.alcf.net">gg.sf02@groups.alcf.net</a>
<u>South Bay</u>	Category	none
> <u>Mountain View 01</u>	Regular Group	Private List – <a href="mailto:gg.mv01@groups.alcf.net">gg.mv01@groups.alcf.net</a>
> <u>Palo Alto 01</u>	Regular Group	Private List – <a href="mailto:gg.pa01@groups.alcf.net">gg.pa01@groups.alcf.net</a>

### Individuals in the Groups in this Category

First Name	Last Name	Email	Member	Group(s)	Role(s)
<u>Addis</u>	<u>Alexander</u>	<a href="mailto:addis.alexander5115@aol.com">addis.alexander5115@aol.com</a>	N	San Francisco 02 and Mountain View 01	Member
<u>Marshal</u>	<u>Allen</u>	<a href="mailto:marshala4963@aol.com">marshala4963@aol.com</a>	Y	San Francisco 02	Faciliator and Member
<u>Clem</u>	<u>Bailey</u>	<a href="mailto:clem.bailey1017@mail.nasa.gov">clem.bailey1017@mail.nasa.gov</a>	Y	Palo Alto 01	Host and Member
<u>Cleo</u>	<u>Barnes</u>	<a href="mailto:cleo.barnes8686@aol.com">cleo.barnes8686@aol.com</a>	Y	San Francisco 02	Faciliator and Member
<u>Pansy</u>	<u>Barry</u>	<a href="mailto:pansy.barry7645@hotmail.com">pansy.barry7645@hotmail.com</a>	N	San Francisco 01	Member
<u>Robbie</u>	<u>Bennett</u>	<a href="mailto:robbie.bennett736@sbcglobal.net">robbie.bennett736@sbcglobal.net</a>	Y	Mountain View 01	Member
<u>Rona</u>	<u>Bennett</u>	<a href="mailto:ronab1488@excite.com">ronab1488@excite.com</a>	Y	San Francisco 02 and Mountain View 01	Member
<u>Mildred</u>	<u>Brennan</u>	<a href="mailto:mildred.brennan5219@northwestern.edu">mildred.brennan5219@northwestern.edu</a>	Y	San Francisco 01	Member
<u>Etheldreda</u>	<u>Brooks</u>	<a href="mailto:ebrooks2987@excite.com">ebrooks2987@excite.com</a>	N	San Francisco 02	Member
<u>Benjamin</u>	<u>Browne</u>	<a href="mailto:benjamin.browne6107@hotmail.com">benjamin.browne6107@hotmail.com</a>	Y	San Francisco 01	Faciliator
<u>Jared</u>	<u>Bryant</u>	<a href="mailto:jbryant2426@gmail.com">jbryant2426@gmail.com</a>	N	Palo Alto 01	Faciliator
<u>Travers</u>	<u>Burke</u>	<a href="mailto:tburke2474@gmail.com">tburke2474@gmail.com</a>	N	San Francisco 02	Member
<u>Connie</u>	<u>Burns</u>	<a href="mailto:cburns8486@rice.edu">cburns8486@rice.edu</a>	Y	Palo Alto 01	Faciliator
<u>Bobby</u>	<u>Carter</u>	<a href="mailto:bobbyc1537@rice.edu">bobbyc1537@rice.edu</a>	N	Mountain View 01	Faciliator
<u>Ginnie</u>	<u>Carter</u>	<a href="mailto:gcarter6314@earthlink.net">gcarter6314@earthlink.net</a>	N	San Francisco 02 and Mountain View 01	Member
<u>Nessia</u>	<u>Clarke</u>	<a href="mailto:nessiac5553@rice.edu">nessiac5553@rice.edu</a>	N	Mountain View 01	Member
<u>Rowena</u>	<u>Coleman</u>	<a href="mailto:rcoleman8763@rice.edu">rcoleman8763@rice.edu</a>	N	Mountain View 01	Host
<u>Juliet</u>	<u>Cox</u>	<a href="mailto:juliet.cox3115@gmail.com">juliet.cox3115@gmail.com</a>	Y	San Francisco 02 and Mountain View 01	Faciliator
<u>Stanford</u>	<u>Cox</u>	<a href="mailto:stanford.cox7017@aol.com">stanford.cox7017@aol.com</a>	N	Mountain View 01	Member
<u>Doug</u>	<u>Daly</u>	<a href="mailto:dougd7928@rocketmail.com">dougd7928@rocketmail.com</a>	N	Palo Alto 01	Member

Clicking on any group will take the user to Screen 4.2.x for that group.

Clicking on any individual will take the user to Screen 2.2 for that individual.

View Group – type "Growth"

This screen is more or less the same for Regular groups as well.

See **Screen 4.2.1** for any additional notes.

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT
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## Growth Group “San Francisco 02”

to **Screen 4.3.1**  
Edit

**Ministry:** Growth Groups

**Parent Category:** Growth Groups > Peninsula

**Email List Preferences:** Private List – [gg.sf02@groups.alcf.net](mailto:gg.sf02@groups.alcf.net)

### Individuals in this Group

to **Screen 4.4.2**  
Add a Member

Edit	First Name	Last Name	Email	Member	Current Role(s)
<a href="#">Edit</a>	<a href="#">Abie</a>	<a href="#">Allen</a>	<a href="mailto:abie.allen3450@yahoo.com">abie.allen3450@yahoo.com</a>	N	Member and Faciliator
<a href="#">Edit</a>	<a href="#">Alastair</a>	<a href="#">McLaughlin</a>	<a href="mailto:amclaughlin5970@sbcyahoo.com">amclaughlin5970@sbcyahoo.com</a>	N	Member
<a href="#">Edit</a>	<a href="#">Alfred</a>	<a href="#">Dwyer</a>	<a href="mailto:alfred.dwyer3352@sbcyahoo.com">alfred.dwyer3352@sbcyahoo.com</a>	N	Member and Host
<a href="#">Edit</a>	<a href="#">Alida</a>	<a href="#">Cooper</a>	<a href="mailto:acooper4275@mail.nasa.gov">acooper4275@mail.nasa.gov</a>	N	Member
<a href="#">Edit</a>	<a href="#">Alva</a>	<a href="#">Wright</a>	<a href="mailto:alvaw1204@rocketmail.com">alvaw1204@rocketmail.com</a>	Y	Member
<a href="#">Edit</a>	<a href="#">Alvina</a>	<a href="#">Peterson</a>	<a href="mailto:alvina.peterson3107@gmail.com">alvina.peterson3107@gmail.com</a>	Y	Member
<a href="#">Edit</a>	<a href="#">Amery</a>	<a href="#">Cullen</a>	<a href="mailto:amery.cullen9880@mail.nasa.gov">amery.cullen9880@mail.nasa.gov</a>	Y	Member
<a href="#">Edit</a>	<a href="#">Andrew</a>	<a href="#">Burke</a>	<a href="mailto:andrew.burke9075@sbcyahoo.com">andrew.burke9075@sbcyahoo.com</a>	Y	Member and Faciliator
<a href="#">Edit</a>	<a href="#">Andy</a>	<a href="#">O'Leary</a>	<a href="mailto:aoleary9121@sbcyahoo.com">aoleary9121@sbcyahoo.com</a>	Y	Member and Faciliator
<a href="#">Edit</a>	<a href="#">Anita</a>	<a href="#">Scott</a>	<a href="mailto:anitas6858@rocketmail.com">anitas6858@rocketmail.com</a>	Y	Member and Faciliator
<a href="#">Edit</a>	<a href="#">Ardelle</a>	<a href="#">McMahon</a>	<a href="mailto:ardelle.mcmahon3962@lycos.com">ardelle.mcmahon3962@lycos.com</a>	N	Member
<a href="#">Edit</a>	<a href="#">Arrian</a>	<a href="#">White</a>	<a href="mailto:awhite7173@aol.com">awhite7173@aol.com</a>	Y	Member
<a href="#">Edit</a>	<a href="#">Artie</a>	<a href="#">White</a>	<a href="mailto:awhite87@hotmail.com">awhite87@hotmail.com</a>	N	Member
<a href="#">Edit</a>	<a href="#">Babs</a>	<a href="#">Johnson</a>	<a href="mailto:bjohnson989@earthlink.net">bjohnson989@earthlink.net</a>	N	Member
<a href="#">Edit</a>	<a href="#">Baldwin</a>	<a href="#">Flores</a>	<a href="mailto:bflores2329@earthlink.net">bflores2329@earthlink.net</a>	Y	Member
<a href="#">Edit</a>	<a href="#">Bass</a>	<a href="#">Doyle</a>	<a href="mailto:bass.doyle7418@sbcglobal.net">bass.doyle7418@sbcglobal.net</a>	N	Member and Host
<a href="#">Edit</a>	<a href="#">Baxter</a>	<a href="#">Hwang</a>	<a href="mailto:baxterh1607@aol.com">baxterh1607@aol.com</a>	N	Member
<a href="#">Edit</a>	<a href="#">Betsy</a>	<a href="#">Ross</a>	<a href="mailto:betsyr1042@excite.com">betsyr1042@excite.com</a>	Y	Member
<a href="#">Edit</a>	<a href="#">Beverley</a>	<a href="#">Evans</a>	<a href="mailto:beverley.evans2383@attmail.com">beverley.evans2383@attmail.com</a>	Y	Member
<a href="#">Edit</a>	<a href="#">Birdie</a>	<a href="#">Graham</a>	<a href="mailto:birdieg134@excite.com">birdieg134@excite.com</a>	Y	Member
<a href="#">Edit</a>	<a href="#">Boby</a>	<a href="#">Kane</a>	<a href="mailto:bobyk4623@hotmail.com">bobyk4623@hotmail.com</a>	N	Member

Edit buttons will take user to **Screen 4.4.1**.

Because a multiple-ministry group needs to be at the top level, Parent Category will gray out if multiple ministries are selected.

Also, because a group is automatically part of a ministry if it has a parent category, ministries will be grayed out if Parent Category is *not* "None".

# ALCF Church Management System

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT
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## Group Category "Growth Groups"

CONFIDENTIAL

only displayed if group is "Confidential"

Ministry: Growth Groups

Parent Category: none

Email List Preferences: Announce Only – [gg@groups.alcf.net](mailto:gg@groups.alcf.net)

to Screen 4.3.1

Edit

### Groups in this Category

Group Name
<a href="#">Peninsula</a>
> <a href="#">San Francisco 01</a>
> <a href="#">San Francisco 02</a>
<a href="#">South Bay</a>
> <a href="#">Mountain View 01</a>
> <a href="#">Palo Alto 01</a>

### Individuals in the Group

First Name
<a href="#">Addis</a>
<a href="#">Marshal</a>
<a href="#">Clem</a>
<a href="#">Cleo</a>
<a href="#">Pansy</a>
<a href="#">Robbie</a>
<a href="#">Rona</a>
<a href="#">Mildred</a>
<a href="#">Etheldreda</a>
<a href="#">Benjamin</a>
<a href="#">Jared</a>
<a href="#">Travers</a>
<a href="#">Connie</a>
<a href="#">Bobby</a>
<a href="#">Ginnie</a>
<a href="#">Nessia</a>
<a href="#">Rowena</a>
<a href="#">Juliet</a>
<a href="#">Stanford</a>
<a href="#">Doug</a>

### Edit Category Group

#### General Information

Name:

Parent Category:

Confidential?: ☐ Check if Confidential

Ministry: 

Growth Groups

Family

Safari Kids

Student Ministries

Worship Arts

#### Email List Preferences

Email List Type:

Name:

Update

Cancel

<a href="#">Etheldreda</a>	<a href="#">Brooks</a>	<a href="mailto:ebrooks2987@excite.com">ebrooks2987@excite.com</a>	N	San Francisco 02	Member
<a href="#">Benjamin</a>	<a href="#">Browne</a>	<a href="mailto:benjamin.browne6107@hotmail.com">benjamin.browne6107@hotmail.com</a>	Y	San Francisco 01	Faciliator
<a href="#">Jared</a>	<a href="#">Bryant</a>	<a href="mailto:jbryant2426@gmail.com">jbryant2426@gmail.com</a>	N	Palo Alto 01	Faciliator
<a href="#">Travers</a>	<a href="#">Burke</a>	<a href="mailto:tburke2474@gmail.com">tburke2474@gmail.com</a>	N	San Francisco 02	Member
<a href="#">Connie</a>	<a href="#">Burns</a>	<a href="mailto:cburns8486@rice.edu">cburns8486@rice.edu</a>	Y	Paio Aito 01	Faciliator
<a href="#">Bobby</a>	<a href="#">Carter</a>	<a href="mailto:bobbyc1537@rice.edu">bobbyc1537@rice.edu</a>	N	Mountain View 01	Faciliator
<a href="#">Ginnie</a>	<a href="#">Carter</a>	<a href="mailto:gcarte6314@earthlink.net">gcarte6314@earthlink.net</a>	N	San Francisco 02 and Mountain View 01	Member
<a href="#">Nessia</a>	<a href="#">Clarke</a>	<a href="mailto:nessiac5553@rice.edu">nessiac5553@rice.edu</a>	N	Mountain View 01	Member
<a href="#">Rowena</a>	<a href="#">Coleman</a>	<a href="mailto:rcoleman8763@rice.edu">rcoleman8763@rice.edu</a>	N	Mountain View 01	Host
<a href="#">Juliet</a>	<a href="#">Cox</a>	<a href="mailto:juliet.cox3115@gmail.com">juliet.cox3115@gmail.com</a>	Y	San Francisco 02 and Mountain View 01	Faciliator
<a href="#">Stanford</a>	<a href="#">Cox</a>	<a href="mailto:stanford.cox7017@aol.com">stanford.cox7017@aol.com</a>	N	Mountain View 01	Member
<a href="#">Doug</a>	<a href="#">Daly</a>	<a href="mailto:dougd7928@rocketmail.com">dougd7928@rocketmail.com</a>	N	Palo Alto 01	Member

This screen is more or less the same for Regular groups as well.

Growth Group “San Francisco 02”

to Screen 4.3.1  
Edit

Ministry: Growth Groups

Email L

Individuals

- Edit First
- Edit Abie
- Edit Alas
- Edit Alfre
- Edit Alida
- Edit Alva
- Edit Alvin
- Edit Ame
- Edit And
- Edit And
- Edit Anita
- Edit Arde
- Edit Arria
- Edit Artie
- Edit Babs
- Edit Baldwin
- Edit Bass
- Edit Baxter
- Edit Betsy
- Edit Beverley
- Edit Birdie
- Edit Boby

to Screen 4.4.2  
Add a Member

to Screen 4.4.2  
Add a Member

Ministry Participation Status

Current Roles: Member  
Host

Add a New Role

Role	Participation Started	Participation Ended
Host	Jul 23, 2009	Enter a Date
Member	Sep 18, 2008	Enter a Date
	Dec 4, 2007	Feb 28, 2008
	Jun 4, 2007	Aug 31, 2007

Edit a Participation Period

Role: Host

Membership Started: Jul 23, 2009

Membership Ended: mm/dd/yyyy

Okay

Update

Cancel

This "Edit a Participation Period" or "Add a New Role" subsection will only appear after the button or link is clicked. When "Editing", Role will be grayed-out. When "Adding", only roles that aren't currently active roles will be available for selection. Roles and Participation Start Date are required. Participation End Date is optional.

<a href="#">Edit</a>	<a href="#">Artie</a>	<a href="#">White</a>	<a href="#">awhite07@hotmail.com</a>	N	Member
<a href="#">Edit</a>	<a href="#">Babs</a>	<a href="#">Johnson</a>	<a href="#">bjohnson989@earthlink.net</a>	N	Member
<a href="#">Edit</a>	<a href="#">Baldwin</a>	<a href="#">Flores</a>	<a href="#">bflores2329@earthlink.net</a>	Y	Member
<a href="#">Edit</a>	<a href="#">Bass</a>	<a href="#">Doyle</a>	<a href="#">bass.doyle7418@sbcglobal.net</a>	N	Member and Host
<a href="#">Edit</a>	<a href="#">Baxter</a>	<a href="#">Hwang</a>	<a href="#">baxterh1607@aol.com</a>	N	Member
<a href="#">Edit</a>	<a href="#">Betsy</a>	<a href="#">Ross</a>	<a href="#">betsyr1042@excite.com</a>	Y	Member
<a href="#">Edit</a>	<a href="#">Beverley</a>	<a href="#">Evans</a>	<a href="#">beverley.evans2383@attmail.com</a>	Y	Member
<a href="#">Edit</a>	<a href="#">Birdie</a>	<a href="#">Graham</a>	<a href="#">birdieg134@excite.com</a>	Y	Member
<a href="#">Edit</a>	<a href="#">Boby</a>	<a href="#">Kane</a>	<a href="#">bobyk4623@hotmail.com</a>	N	Member

This screen is more or less the same for Regular groups as well.

List of Roles is defined at the Ministry level.

Upon hitting **Next**, the system will try and determine if there are any matches. If none exists, the system will popup a "Individual Does Not Exist – Create a New Individual record?" confirmation dialog box. If at least one exists, the user will be redirected to **Screen 4.4.3**.

ALCF Church Management System

Welcome, Joe User

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PEOPLEHOUSEHOLDSGROUPSCOMMUNICATIONSADMINISTRATIONLOG OUT

Growth Group “San Francisco 02”

Ministry:

Parent Category:

Email List Preferences:

to Screen 4.3.1

Edit

Individuals in this Group

Edit	First Name
Edit	Abie
Edit	Alastair
Edit	Alfred
Edit	Alida
Edit	Alva
Edit	Alvina
Edit	Amery
Edit	Andrew
Edit	Andy
Edit	Anita
Edit	Ardelle
Edit	Arrian
Edit	Artie
Edit	Babs
Edit	Baldwin
Edit	Bass
Edit	Baxter
Edit	Betsy
Edit	Beverley
Edit	Birdie
Edit	Boby

to Screen 4.4.2

Add a Member

Add a Ministry Participant to “San Francisco 02”

Role in Group

Role:Faciliator

Participation Started:Jul 23, 2009

Participation Ended:mm/dd/yyyy

Name Information

Title:- None -

First Name:Jennifer

Middle Name or Initial:

Last Name:Peterson

Suffix:- None -

Goes By:Jenny Peterson

To be used for emails, mailings, etc.  
If left blank, "Patrick Smith" will be used.

Contact Information

Email:jpeterson@gmail.com

Phone:408-555-1212

Cell Phone

NextCancel

Kane

bobyk4623@hotmail.com

N

Member



This screen is more or less the same for Regular groups as well.

Hitting **Select** will add the selected individual as a new member to the group. The window will then close, essentially redirecting the user to **Screen 4.2.2**.

Hitting **Create** will first create the new individual *without a household record* and then associate the individual as a new member to the group. The user will then be prompted "View/Edit Preferences for the New Individual?" If yes, the user will be redirected to **Screen 2.2** for the new individual. Otherwise, the dialog box will close, essentially redirecting the user to **Screen 4.2.2**.

Hitting **Back** will take the user back to **Screen 4.4.2**.

Hitting **Close** will close the dialog box, essentially redirecting the user to **Screen 4.2.2**.

# ALCF Church Management System

Welcome, Joe User

PEOPLE

HOUSEHOLDS

GROUPS

COMMUNICATIONS

ADMINISTRATION

LOG OUT

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## Growth Group "San Francisco 02"

to Screen 4.3.1

Edit

Ministry:

Parent Category:

Email List Preferences:

### Individuals in this Group

Edit	First Name
<a href="#">Edit</a>	<a href="#">Abie</a>
<a href="#">Edit</a>	<a href="#">Alastair</a>
<a href="#">Edit</a>	<a href="#">Alfred</a>
<a href="#">Edit</a>	<a href="#">Alida</a>
<a href="#">Edit</a>	<a href="#">Alva</a>
<a href="#">Edit</a>	<a href="#">Alvina</a>
<a href="#">Edit</a>	<a href="#">Amery</a>
<a href="#">Edit</a>	<a href="#">Andrew</a>
<a href="#">Edit</a>	<a href="#">Andy</a>
<a href="#">Edit</a>	<a href="#">Anita</a>
<a href="#">Edit</a>	<a href="#">Ardelle</a>
<a href="#">Edit</a>	<a href="#">Arrian</a>
<a href="#">Edit</a>	<a href="#">Artie</a>
<a href="#">Edit</a>	<a href="#">Babs</a>
<a href="#">Edit</a>	<a href="#">Baldwin</a>
<a href="#">Edit</a>	<a href="#">Bass</a>
<a href="#">Edit</a>	<a href="#">Baxter</a>
<a href="#">Edit</a>	<a href="#">Betsy</a>
<a href="#">Edit</a>	<a href="#">Beverley</a>
<a href="#">Edit</a>	<a href="#">Birdie</a>
<a href="#">Edit</a>	<a href="#">Boby</a>

### Matched Individuals

Select	First Name	Last Name	Address	Email
<a href="#">Select</a>	Jennifer	Peterson	425 Western Ave	none
<a href="#">Select</a>	Jen	Peterson-Smith	285 Maple Drive, Apt. #3	jps@hotmail.com
<a href="#">Select</a>	Jenny	Pattyson	1802 Pasqualito Drive	none

Back

Create Jenny Peterson as a New Individual

Cancel

to Screen 4.4.2

Add a Member

View Group Roles for Ministry

Allows the user to view and edit assignable group roles for the ministry.

Only users affiliated with a given ministry can view or edit the roles for that ministry.

Each defined role must have a role type:

- Volunteer
- Participant

Only roles that are not currently being used are able to be Deleted.

Clicking on "Edit" allows the user to use the textbox to edit a particular role name. "Add Role" disappears and "Update" and "Cancel" appear instead.

# ALCF Church Management System

Welcome, Joe User

PEOPLE

HOUSEHOLDS

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COMMUNICATIONS

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## View Roles in "Worship Arts"

Edit / Delete	Role
<a href="#">Edit</a>   <a href="#">Delete</a>	Actor (Volunteer)
<a href="#">Edit</a>   <a href="#">Delete</a>	Leader (Volunteer)
<a href="#">Edit</a>   <a href="#">Delete</a>	Musician (Volunteer)
<a href="#">Edit</a>   <a href="#">Delete</a>	Participant (Participant)
<a href="#">Edit</a>   <a href="#">Delete</a>	Singer (Volunteer)

Role Name:

Role Type:

Add Role

updates the above list and saves changes

Back to View Groups

to Screen 4.1.1

ALCF Church Management System

Welcome, Joe User

PEOPLE

HOUSEHOLDS

GROUPS

COMMUNICATIONS

ADMINISTRATION

LOG OUT


Administration Menu

View Users

goes to Screen 6.2

View and Manage Users of the ChMS System

ChMS Main IA.graffle  
Wed Feb 03 2010  
Page 55 of 55



ALCF

Following Follow-up of Resolving Committee

768 px

+240 px