0.1 Login

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

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

Passwords are their Windows Domain network

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

ALCF Church Management System

ChMS Staff Login

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

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

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

This acts as the "Main Menu" for the entire adminsite 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:

- 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
- CanViewStewardship
 CanViewConfidentialNotes

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

this permission.

ALCF Church Management System

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

Main Menu





People
goes to Screen 2.1

Households
goes to Screen 3.1

Groups
goes to Screen 4.1

Manage individual membership records

Manage household records
goes to Screen 3.1

Administration
goes to Screen 6.1

Communications

goes to Screen 5.1

Manage administration tasks for the ALCF ChMS

Manage communication lists



Welcome, Joe User

Search for an Individual

This allows the user to search for an any individual

Each individual can be a membership status of

Member

Non-Member/Tithe

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

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

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

ALCF Church Management System

Donnelly

<u>Doyle</u>

<u>Duffy</u>

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

Search for an Individual

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

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

Non-Member/Tithe

Non-Member/Tithe

Member

65033 Cudahy Blvd.

77280 Redwood City Way

12497 La Habra Road



Blythe

Indian Wells

Fort Bragg

<u>Griz</u>

<u>Tina</u>

<u>Beverly</u>

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

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

- be displayed on **Screen 2.2** Individual that is not part of any households (e.g. single person) would be displayed on **Screen 2.2.1**
- Individual that is part of multiple households would be displayed on **Screen 2.2.2**

that an individual belongs to is also listed on the page.

Any fellow household members for all households

Position in household can be one of the following:
• Head

- Spouse
- Child
- ???
- (((

There can only be one Head of Household.

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

ALCF Church Management System

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

Individual: John Smith





Record last updated on February 23, 2009 by Doris Cohen

<u>View Change Log</u>

Welcome, Joe User

Edit

to Screen 2.2.5

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

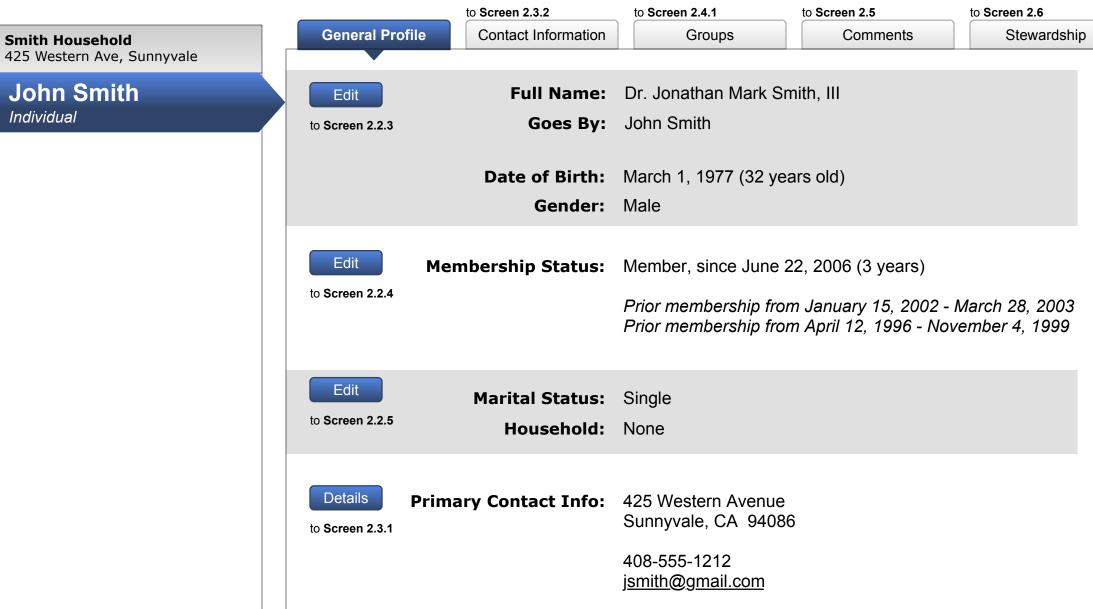
View an Individual - General Profile Tab Not Part of Any Household

See Screen 2.2 for notes.

ALCF Church Management System

LOG OUT GROUPS PEOPLE HOUSEHOLDS COMMUNICATIONS ADMINISTRATION

Individual: John Smith



Record last updated on February 23, 2009 by Doris Cohen

View Change Log

Welcome, Joe User

Edit

to Screen 2.2.5

768 px

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

View an Individual - General Profile Tab Multiple Households

See Screen 2.2 for notes.

ALCF Church Management System

GROUPS PEOPLE HOUSEHOLDS COMMUNICATIONS ADMINISTRATION LOG OUT

Individual: John Smith





to Screen 2.2.6

Edit Marital Status: Single to Screen 2.2.5

Details

to Screen 2.3.1

Households: Child in the Smith Household

Child in the Adams Household Child in the Westfield Household

Primary Contact Info: 425 Western Avenue

Sunnyvale, CA 94086

408-555-1212 jsmith@gmail.com

Clicking on any of the other households will refresh

Adams Household 123 Main Street, Palo Alto

Westfield Household

1852 Mary Ave, Sunnyvale

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

the accordion, showing the members of that

household and the individual's role in that

household.

ChMS Main IA.graffle Fri Dec 11 2009 Page 6 of 25

Welcome, Joe User

Edit

ALCF Church Management System

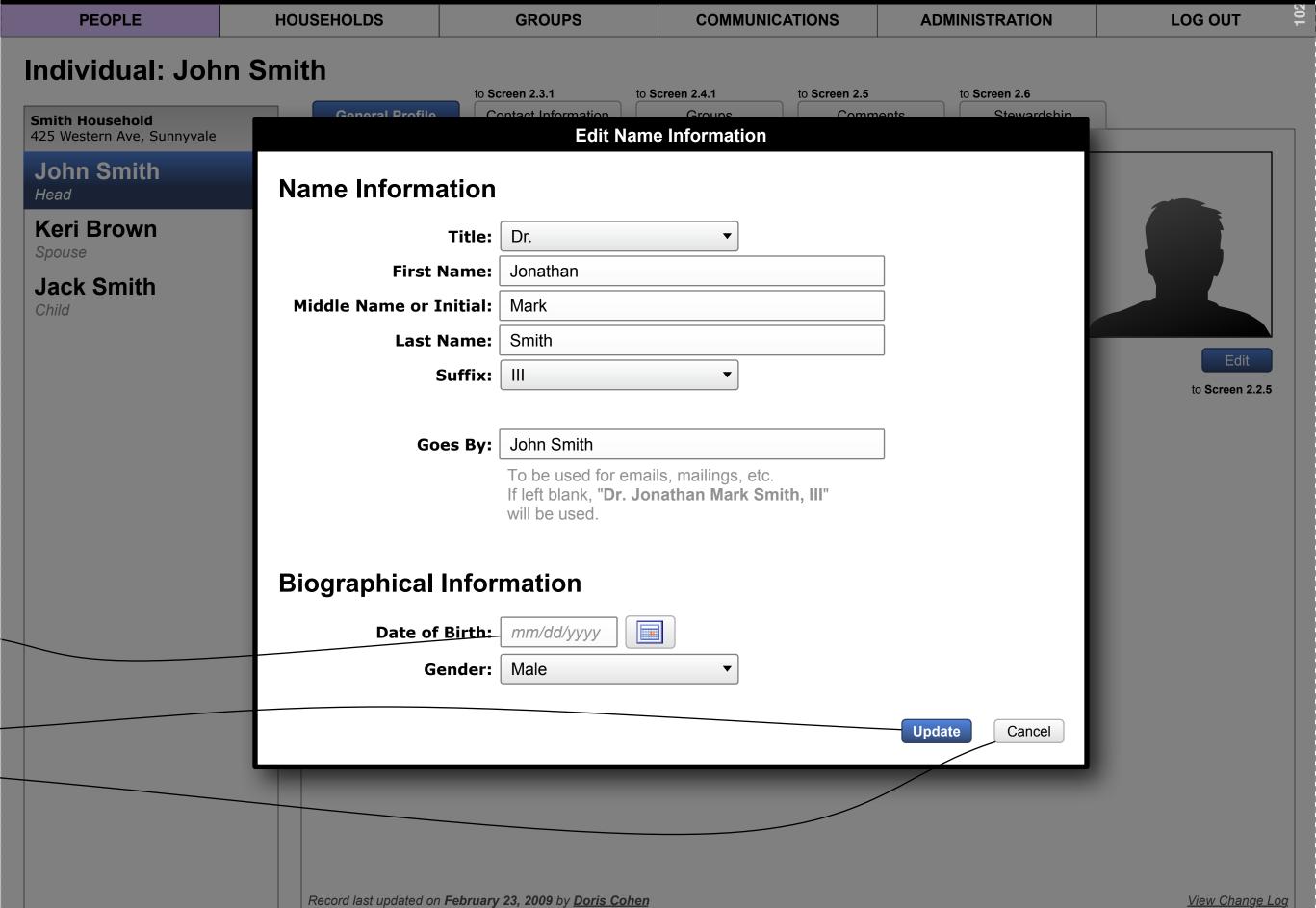
Edit an Individual – General Information

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

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

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

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



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

Edit an Individual – Membership Information

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

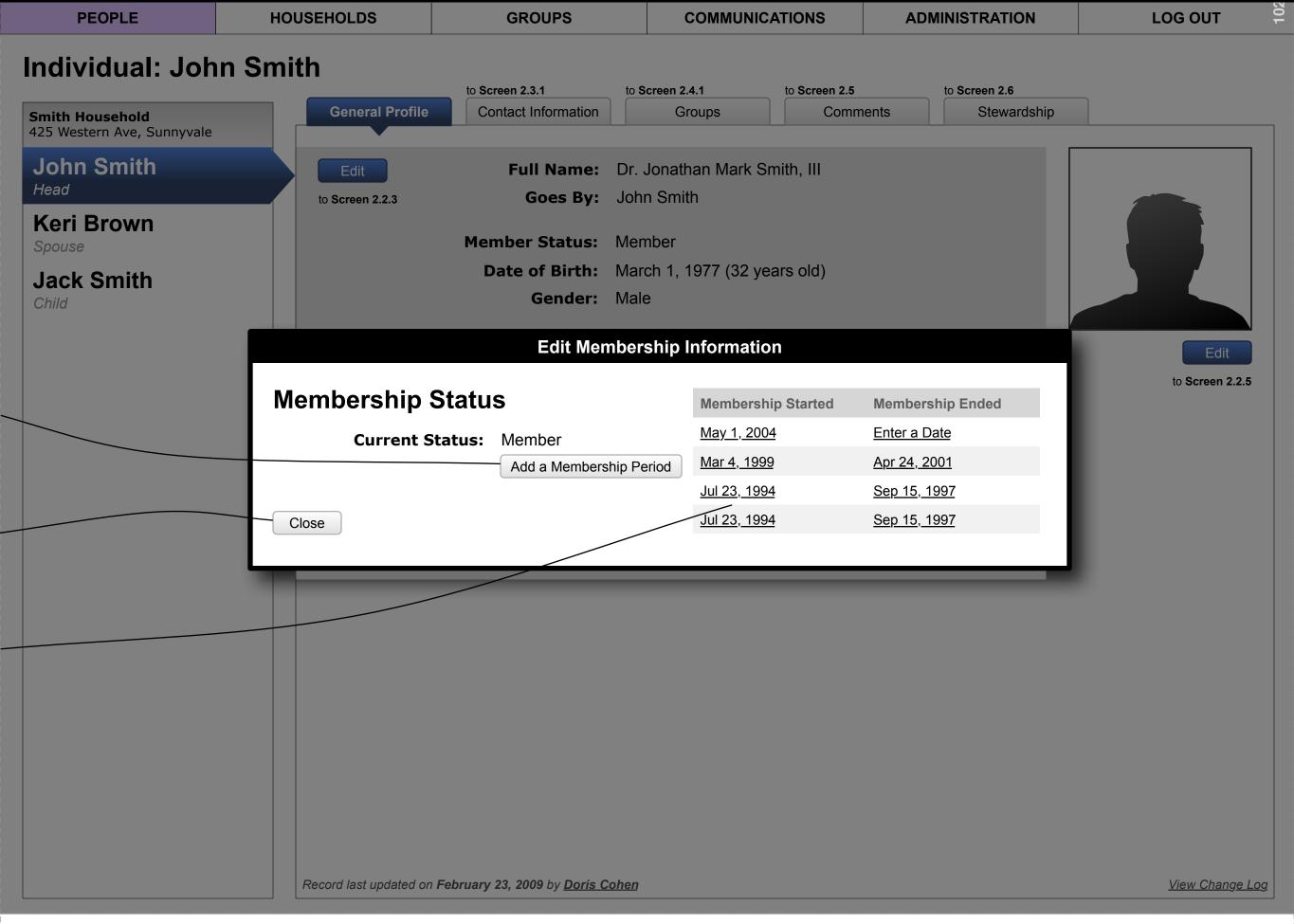
Note that the actual Membership Status is calculated based on the start and end date of an individual's membership period.

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

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

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





Welcome, Joe User

ALCF Church Management System

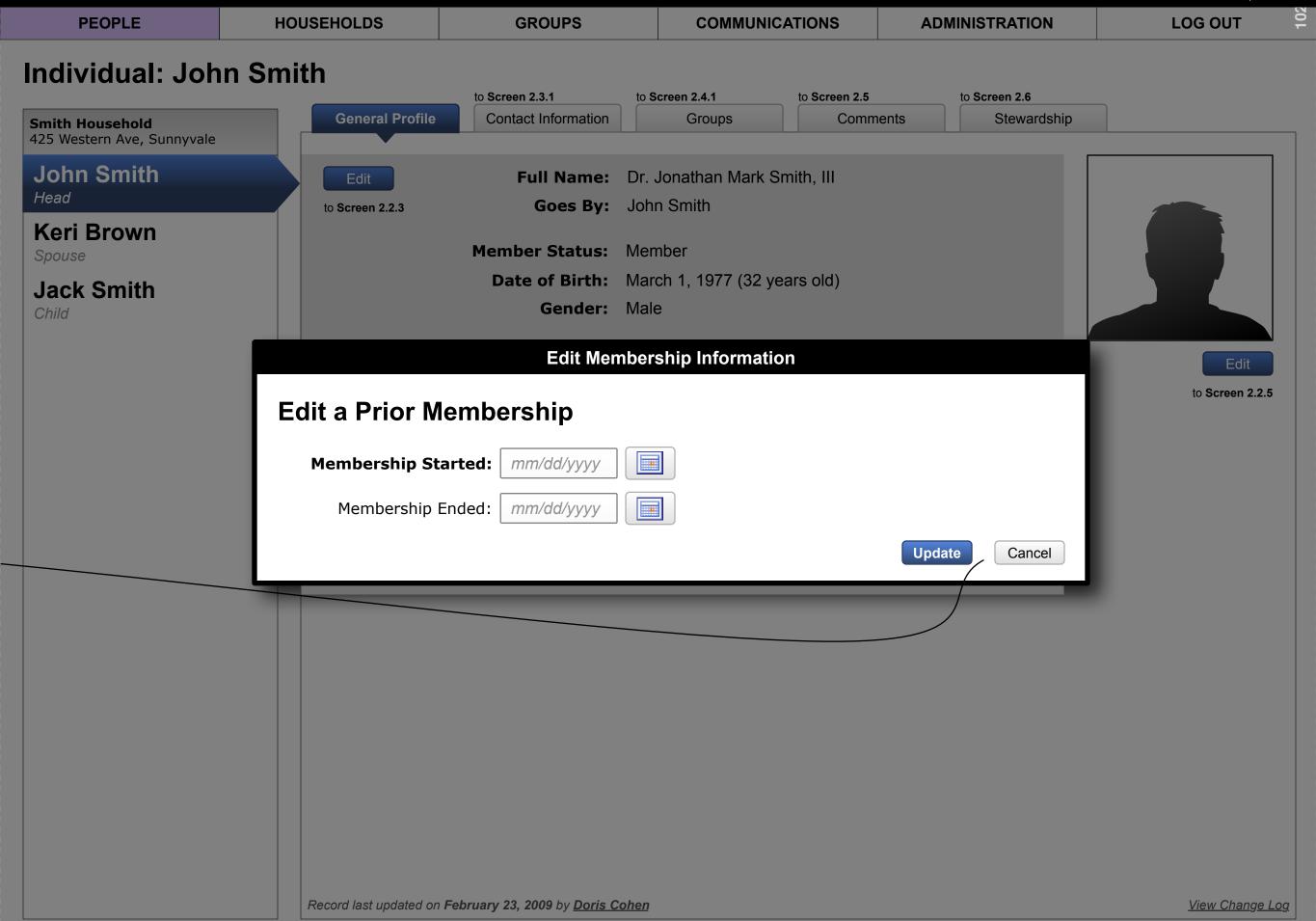
Edit an Individual – Membership Dates

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

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

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

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



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

Edit an Individual – Family and Households

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

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

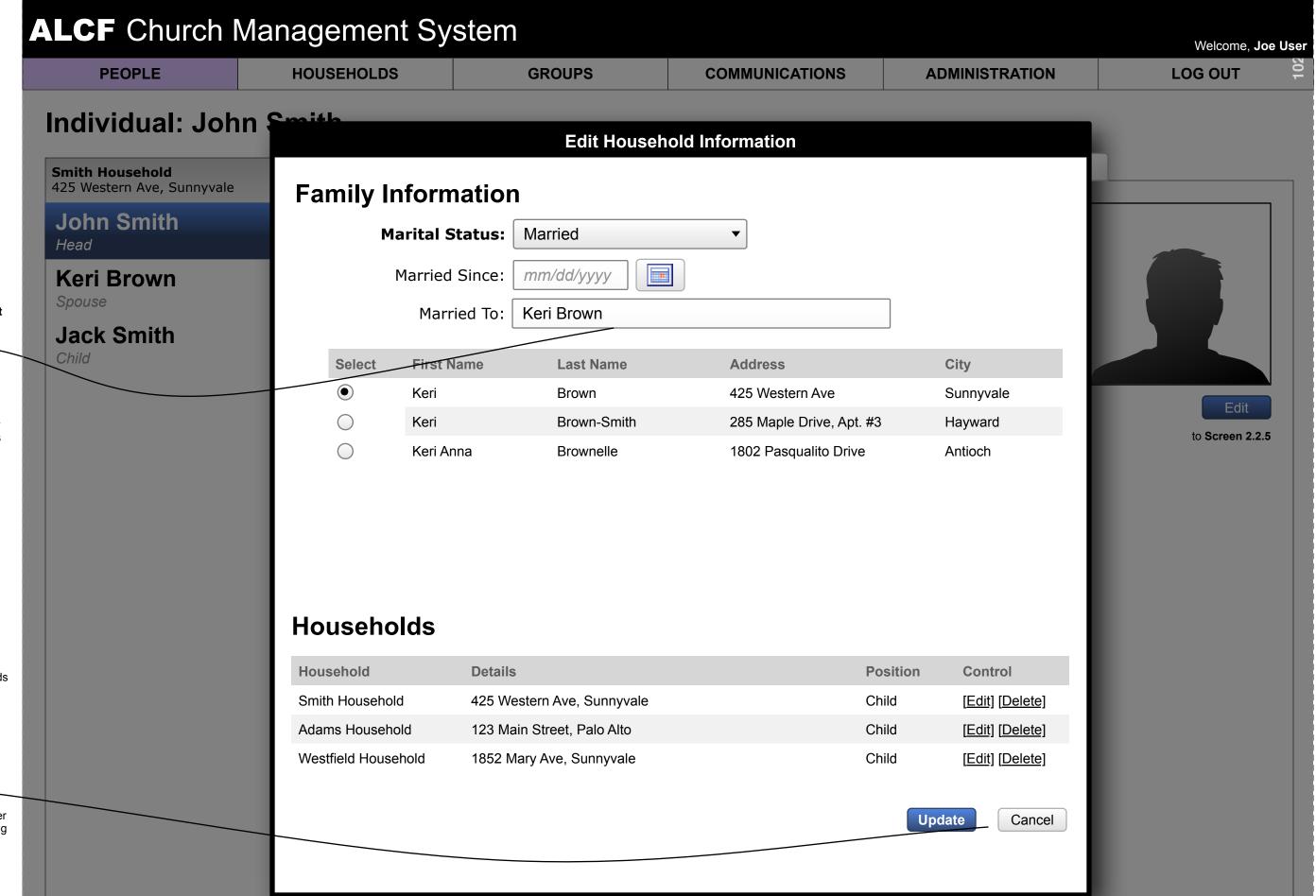
Therefore, changing the name will refresh the datagrid of individuals. If a name is entered, the individual must be selected — if none is selected, then the user will be prompted "Create a new database record for 'Keri Brown' as a new Individual?" The user must either specify "Yes" or must enter in another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

TODO: Edit/Delete and creation of new households still needs to be defined.

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.

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Record last updated on February 23, 2009 by Doris Cohen



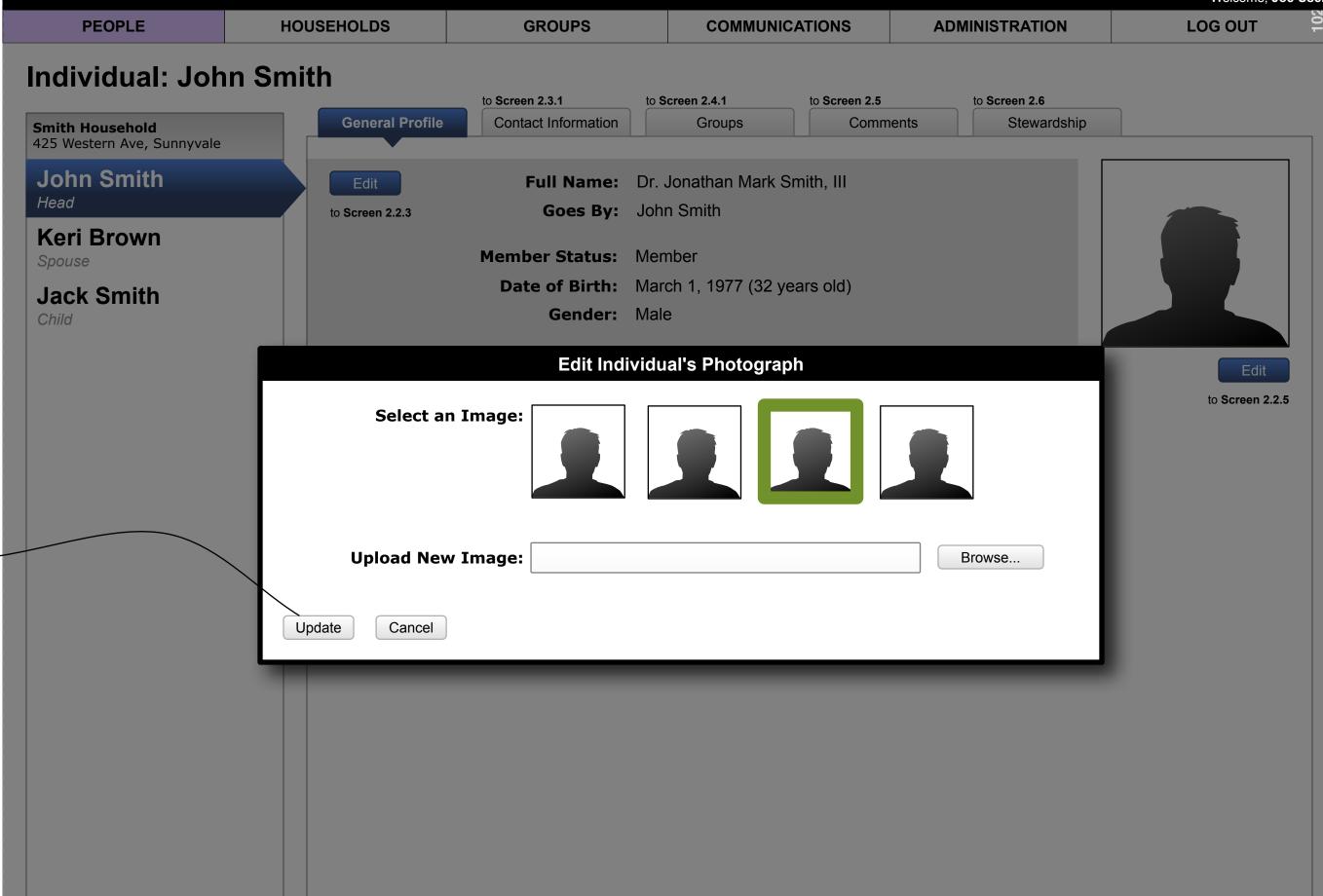
View Change Log

ALCF Church Management System

Edit an Individual – Photograph

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

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



Record last updated on February 23, 2009 by Doris Cohen

View Change Log

ALCF Church Management System IA Membership Subsystem **ALCF** Church Management System 2.3.1 View an Individual, Contact Welcome, Joe User Information **PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS LOG OUT ADMINISTRATION** View an Individual - Contact Information Tab Sinale Household **Individual: John Smith** This screen shows all the various contact informations for this Individual, both through his/her to Screen 2.2.1 to Screen 2.6 to Screen 2.4.1 to Screen 2.5 household (e.g. home phone and home address) as well as individual contact information (e.g. business General Profile **Contact Info** Groups Comments Stewardship **Smith Household** phone and business address, email, etc.) 425 Western Ave, Sunnyvale The Add New button is used to add a new current to Screen 2.3.2 John Smith Home Address and Phone for the Smith Household home address for the household — in essence, it's Add New to be used when the household is reporting a move Head Current **Address** City/State **Zip Code Home Phone** Clicking on any of the addresses allows the user to Keri Brown edit the address information -- but it's primarily to be 94086 **Current Home** 425 Western Ave Sunnyvale, CA 408-555-1212 used to edit/fix mistakes. If a new address is to be Spouse reported (e.g. due to a move), the Add New button should be used instead, so that old/historic home 123 Main Street, Apt. #3 Palo Alto, CA 94011 650-555-1212 [set as current] Jack Smith address information can be kept in the system 94087 <u>1852 Mary Ave</u> Sunnyvale, CA 408-421-1725 Child [set as current] Clicking on any address or the Add New button will redirect the user to Screen 2.3.2. to Screen 2.3.3 Clicking on **Set as Current** will simply relabel the **Other Addresses for John Smith** address as the "Current Home" address. Any Add New "Current Home" address will be set as a Previous **Address Type Address** City/State **Zip Code** Clicking on any address in "other addresses" or the **Current Work** 401 El Camino Real Mountain View, CA 94043 Add New button will redirect the user to Screen 818 Third Street Previous Home San Francisco, CA 94107 Address Types for "other addresses" can be: Current Work Previous Home 2811 Hillsdale Road, Apt. #412 Hillsdale, CA 94401 Previous Work Previous Home (only for individuals who are in at **Previous Work** 801 Canal Street, Suite #27A Redwood City, CA 94402 least one multi-person household) to Screen 2.3.4 to Screen 2.3.5 Clicking on non-home telephone or the Add New **Phone Numbers for John Smith Email Addresses** Add New Add New button will redirect the user to Screen 2.3.4. Note: the only way to edit/add/remove a Home **Primary? Phone Type Phone Number Primary? Email Address** phone is to go through the "Home Address and Phone for the Smith Household" at the top of the Primary Home 408-555-1212 Primary john smith@gmail.com page (e.g. through Screen 2.3.2) Telephone Types for "Phone Information" can be: [set as primary] Home 408-281-2381 [set as primary] jsmith1231@yahoo.com Home (only editable via Screen 2.3.2) [set as primary] <u>Mobile</u> 415-552-9138 [set as primary] john.f.smith@company.org Work • Fax 650-228-1248 [set as primary] <u>Work</u> Other 650-228-1200 <u>Work</u> Only one phone can be set as "Primary". [set as primary] [set as primary] <u>Other</u> <u>626-291-2481</u> Clicking on email address or the Add New button will redirect the user to Screen 2.3.5. to Screen 2.3.6 **Other Contact Information for John Smith** Add New Clicking on any "Other Contact" or the Add New Contact Type Value button will redirect the user to Screen 2.3.6. AIM Screen Name jsmith48421 28410241 Facebook ID Twitter Account Name john smith 4 17 Yahoo! Messenger Name jsmith1231 **ChMS Main IA.graffle** Fri Dec 11 2009 Page 12 of 25 768 px Paleodog Jalone ap of Seeing Genetic Record last updated on February 23, 2009 by Doris Cohen View Change Log

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

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?"

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

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

ALCF Church Management System Welcome, Joe User **PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS LOG OUT ADMINISTRATION Individual: John Smith** to Screen 2.2.1 to Screen 2.4.1 to Screen 2.6 to Screen 2.5 General Profile **Contact Info** Groups Comments Stewardship **Smith Household** 425 Western Ave, Sunnyvale to Screen 2.3.2 John Smith Home Address and Phone for the Smith Household Add New Head Current **Address** City/State **Zip Code Home Phone** Keri Brown 94086 **Current Home** 425 Western Ave Sunnyvale, CA 408-555-1212 Spouse <u>5-1212</u> Jack Smith Edit Household - Home Address and Phone <u>-1725</u> Child **Home Address** to Screen 2.3.3 Add New **Current/Previous: Current Home Address** 425 Western Ave. Address 1: Address 2: City, State, Postal Code: - State - ▼ Postal Code **Primary?** to Screen 2.3.5 Add New Primary Home Phone: 650-555-1212 Address 650-824-1241 Alternate Home Phone: mith@gmail.com Alternate Home Phone: 650-555-1234 1231@yahoo.com mith@company.org **Add Another Update** Cancel to Screen 2.3.6 **Other Contact Information for John Smith** Add New **Contact Type** AIM Screen Name jsmith48421 Facebook ID 28410241 **Twitter Account Name** john smith 4 17 Yahoo! Messenger Name jsmith1231

View Change Log

Record last updated on February 23, 2009 by Doris Cohen

ChMS Main IA.graffle Fri Dec 11 2009 Page 13 of 25



768 px

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

Edit an Individual – Other Address

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

See Screen 2.3.1 for address type information.

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

ALCF Church Management System Welcome, Joe User **PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT Individual: John Smith** to Screen 2.2.1 to Screen 2.4.1 to Screen 2.6 to Screen 2.5 General Profile **Contact Info** Stewardship Groups Comments **Smith Household** 425 Western Ave, Sunnyvale to Screen 2.3.2 John Smith Home Address and Phone for the Smith Household Add New Head Current **Address** City/State **Zip Code Home Phone** Keri Brown **Current Home** 94086 425 Western Ave Sunnyvale, CA 408-555-1212 Spouse 123 Main Street, Apt. #3 Palo Alto, CA 94011 650-555-1212 [set as current] Jack Smith 1852 Mary Ave 94087 Sunnyvale, CA 408-421-1725 Child [set as current] to Screen 2.3.3 Other Addresses for John Smith Add New **Edit Other Address Address Information Address Type: Current Work** 2810 Coleman Avenue Address 1: Address 2: to Screen 2.3.5 Add New Postal Code **City, State, Postal Code:** - State - ▼ Address mith@gmail.com Update Cancel 1231@yahoo.com smith@company.org [set as primary] 650-228-1248 <u>Work</u> 650-228-1200 <u>Work</u> [set as primary] 626-291-2481 [set as primary] to Screen 2.3.6 **Other Contact Information for John Smith** Add New **Contact Type** AIM Screen Name jsmith48421 Facebook ID 28410241 **Twitter Account Name** john smith 4 17 Yahoo! Messenger Name jsmith1231 768 px As Looking Tallers up of the Ang Velenter Record last updated on February 23, 2009 by Doris Cohen View Change Log



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

Edit an Individual – Phone Number

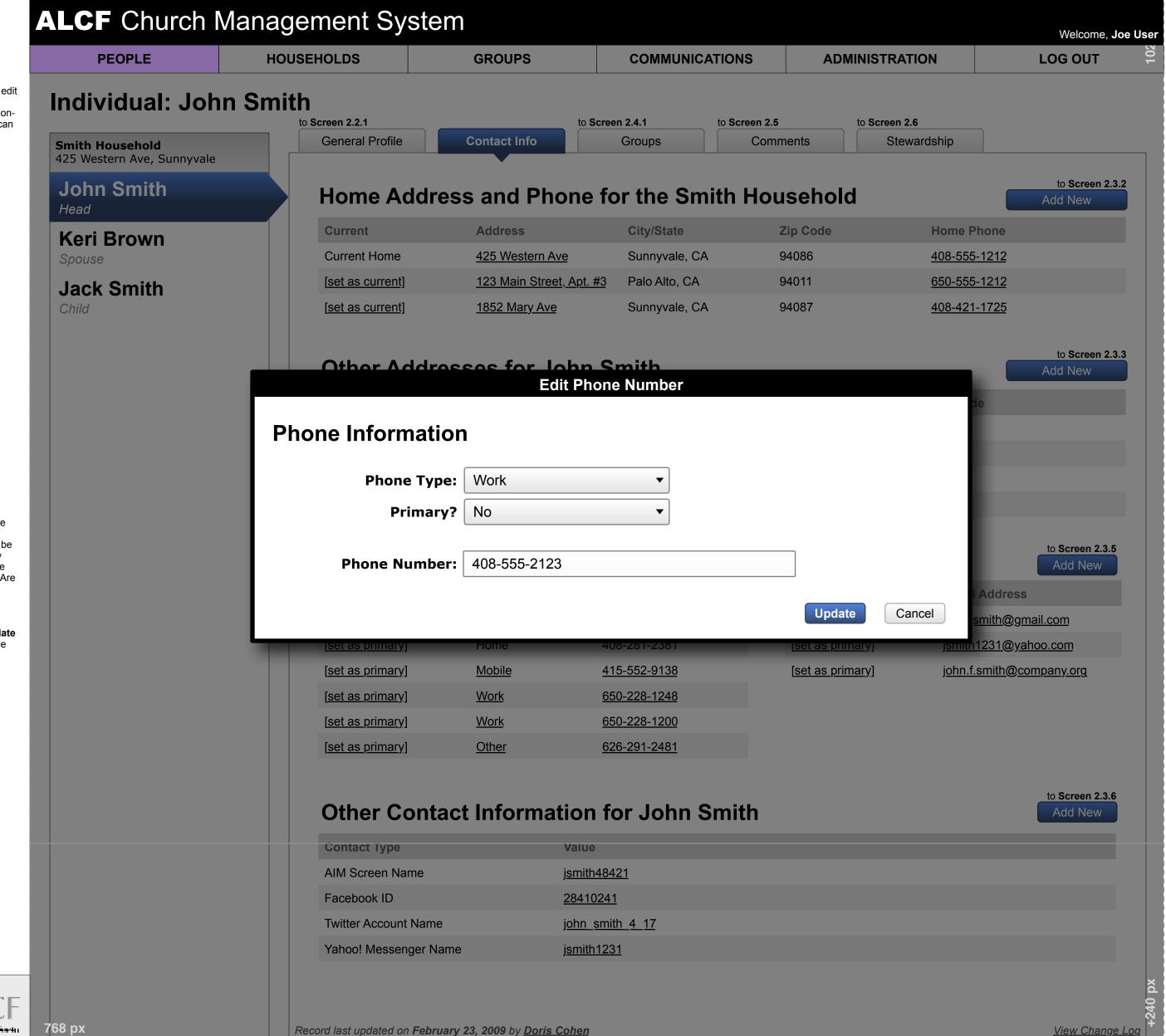
This dialog box allows the user to add a new or edit an existing phone number assigned to this individual. Note that this is only applicable for nonhome phone numbers. Home phone numbers can only be edited through **Screen 2.3.2**.

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

See Screen 2.3.1 for phone type information.

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

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



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

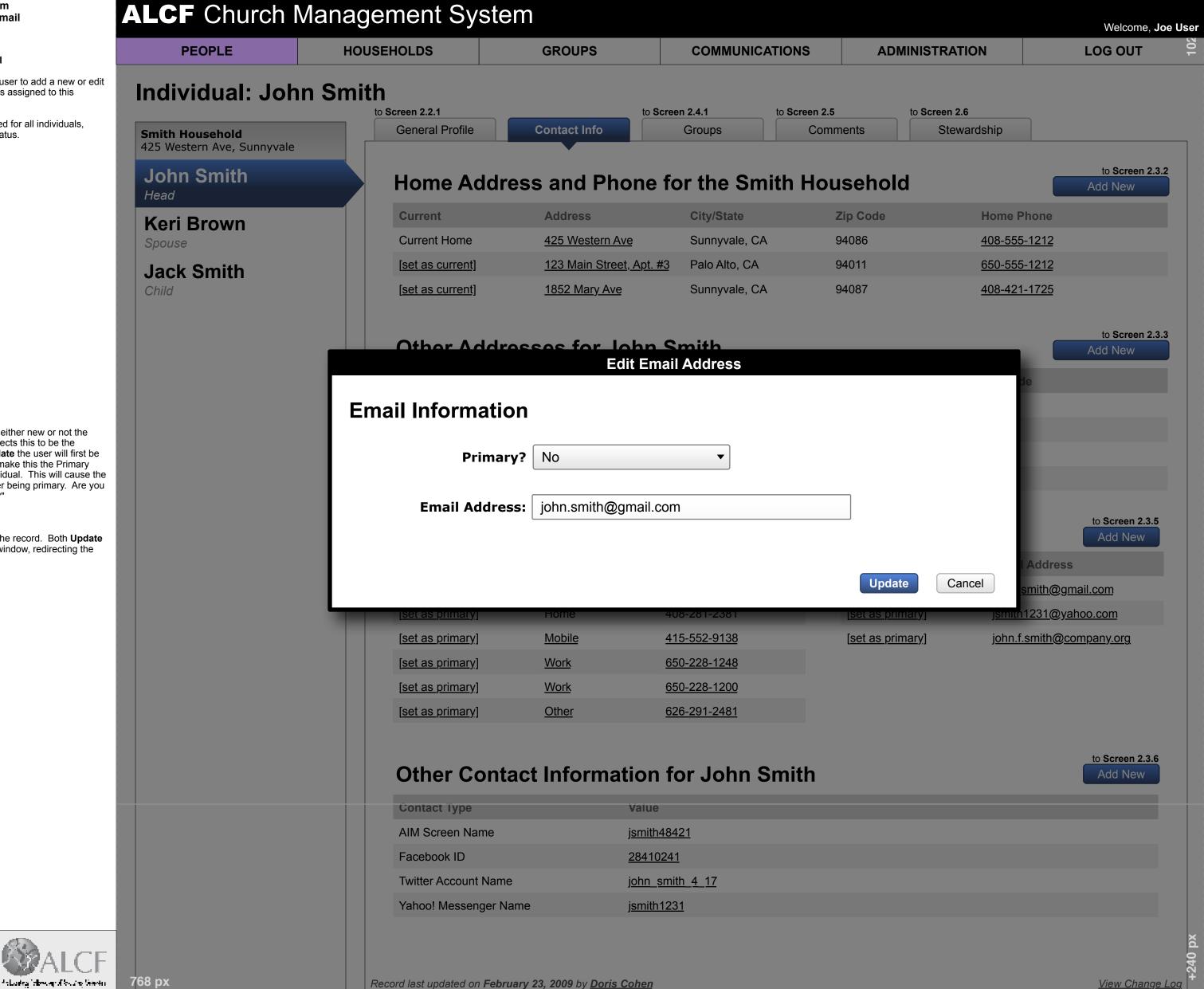
Edit an Individual - Email

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

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

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

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



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

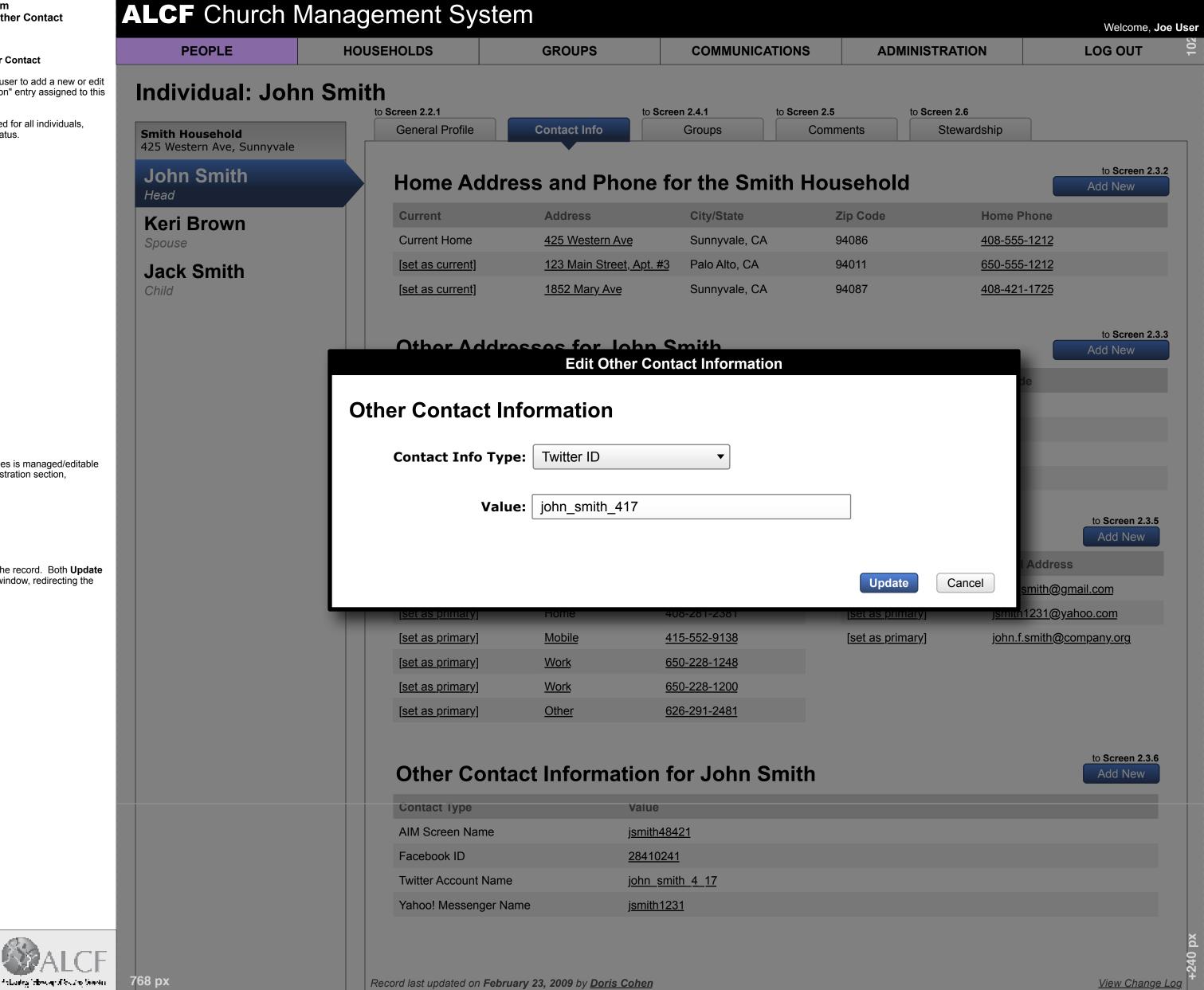
Edit an Individual - Other Contact

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

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

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

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



ChMS Main IA.graffle Fri Dec 11 2009 Page 17 of 25



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

View an Individual – Groups

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

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

ALCF Church Management System

PEOPLE HOUSEHOLDS GROUPS LOG OUT COMMUNICATIONS ADMINISTRATION

Groups

Individual: John Smith



Keri Brown

Spouse

Jack Smith

Child

Ministry Participation

to Screen 2.3.1

Contact Info

to Screen 2.2.1

General Profile

Ministry Role **Dates of Involvement** April 2009 - Present Safari Kids Volunteer May 2007 - September 2008 January 4, 2004 - Present Growth Groups > Mountain View 2 Participant

Small Group Leader

to Screen 2.5

Comments

to Screen 2.6

Stewardship

September 24, 2007 - May 2008

Communication Lists

Real World Young Adults

to Screen 2.4.3 Add New

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

ChMS Main IA.graffle Fri Dec 11 2009 Page 18 of 25

768 px

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

Welcome, Joe User

to Screen 2.4.2

Add New

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

Edit Individual — Ministry Participation

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

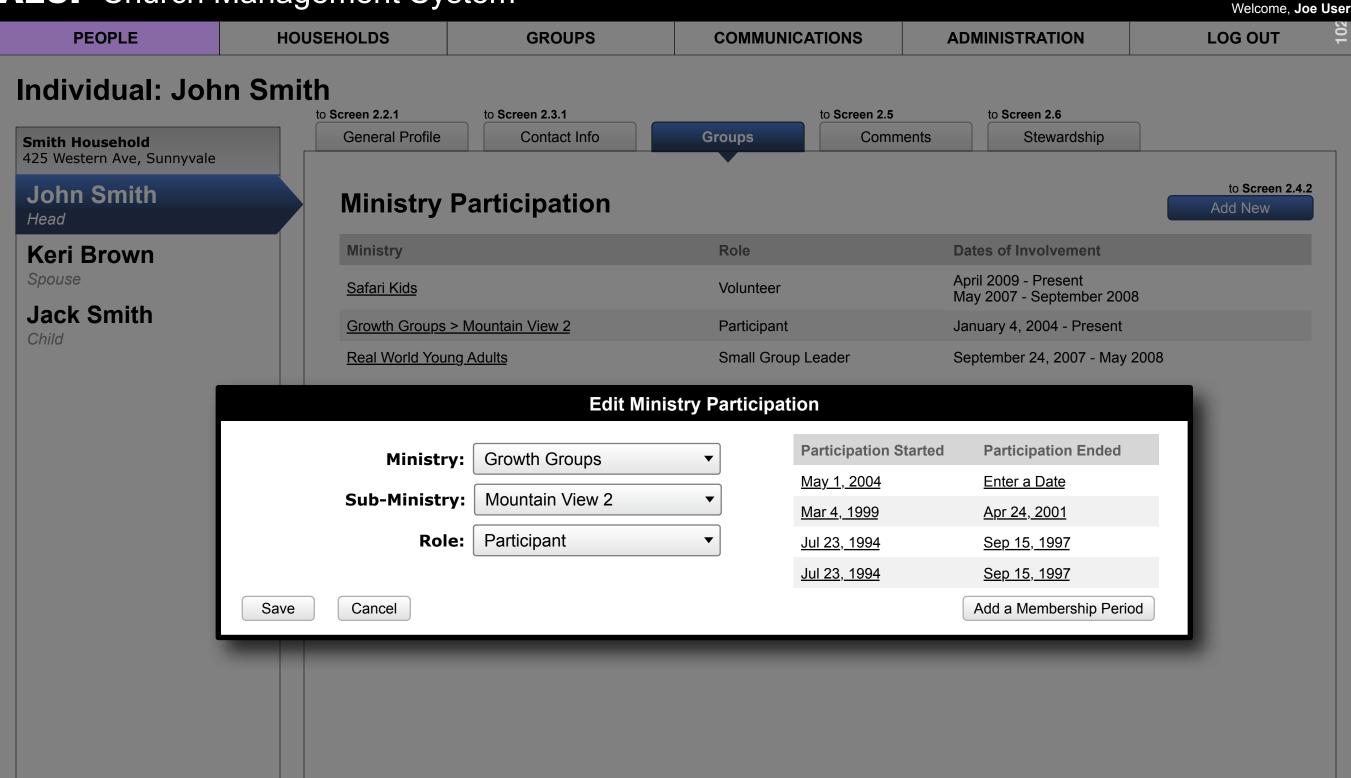
In order to better manage ministries and subministries, ministry drop-downs could be

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

Clicking on any date will show a date-textbox to

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







Fri Dec 11 2009 Page 19 of 25



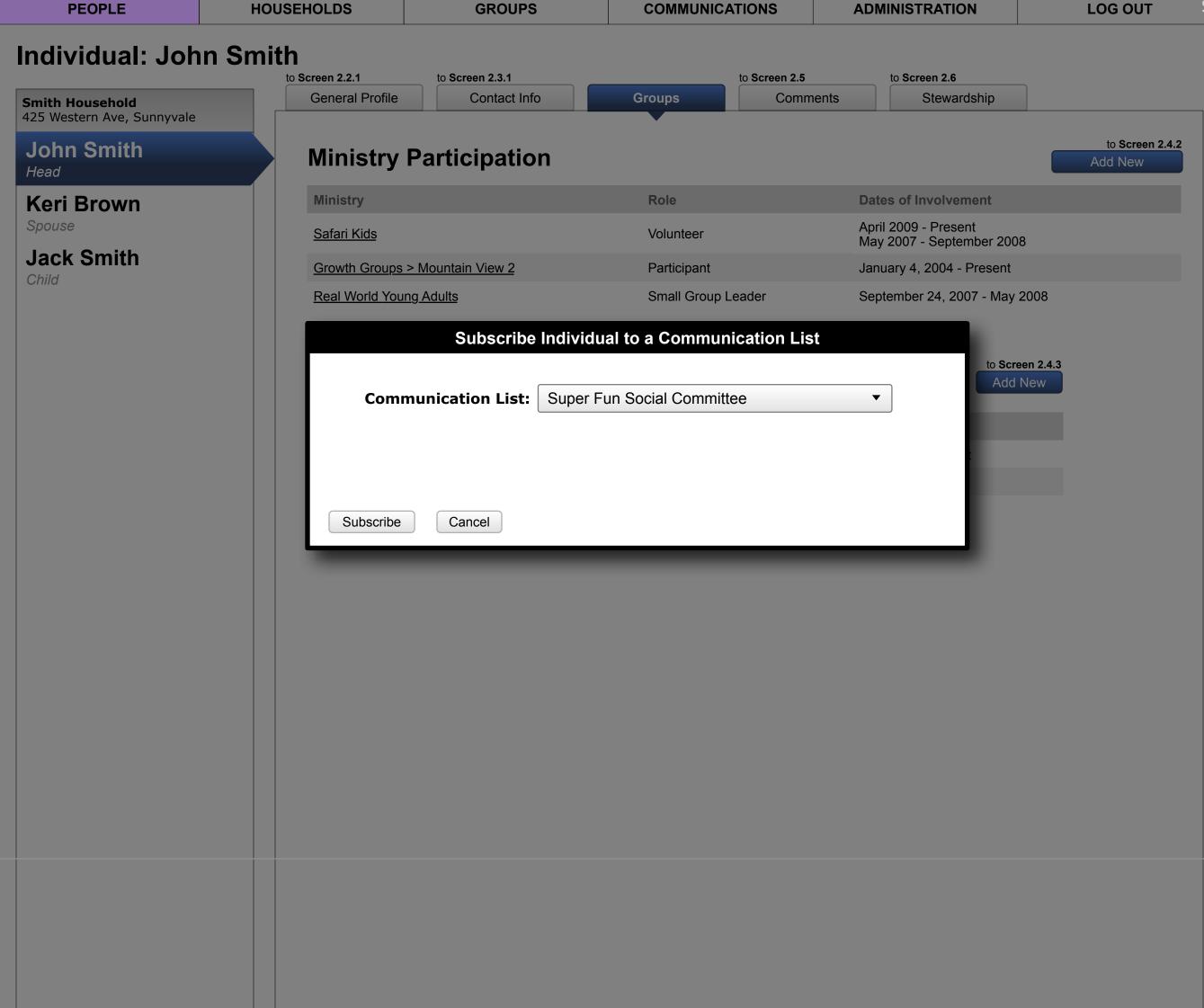
ALCF Church Management System IA Membership Subsystem 2.4.2 Edit Individual, Communication List

Edit Individual — Communication List

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

ALCF Church Management System

Welcome, Joe User



View Change Log

Record last updated on February 23, 2009 by Doris Cohen

ChMS Main IA.graffle Fri Dec 11 2009 Page 20 of 25



768 px

to Screen 2.5.1

Add New

ALCF Church Management System

GROUPS

Contact Info

to Screen 2.3.1

COMMUNICATIONS

ADMINISTRATION

Comments

to Screen 2.6

LOG OUT

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

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

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

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

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

Individual: John Smith

Smith Household 425 Western Ave, Sunnyvale

to Screen 2.2.1

General Profile

- View All -

John Smith Head

Keri Brown

Spouse

Jack Smith

Child

	Coi	mments	and	Notes
--	-----	--------	-----	--------------

Filter by Posted By:

Filter by Comment Type:

to Screen 2.4.1

Groups

- View All -

Filter by Hidden State:

quis metus. Mauris lectus. Quisque erat nunc.

Stewardship

✓ Include HIdden Comments

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

ChMS Main IA.graffle Fri Dec 11 2009 Page 21 of 25

768 px

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

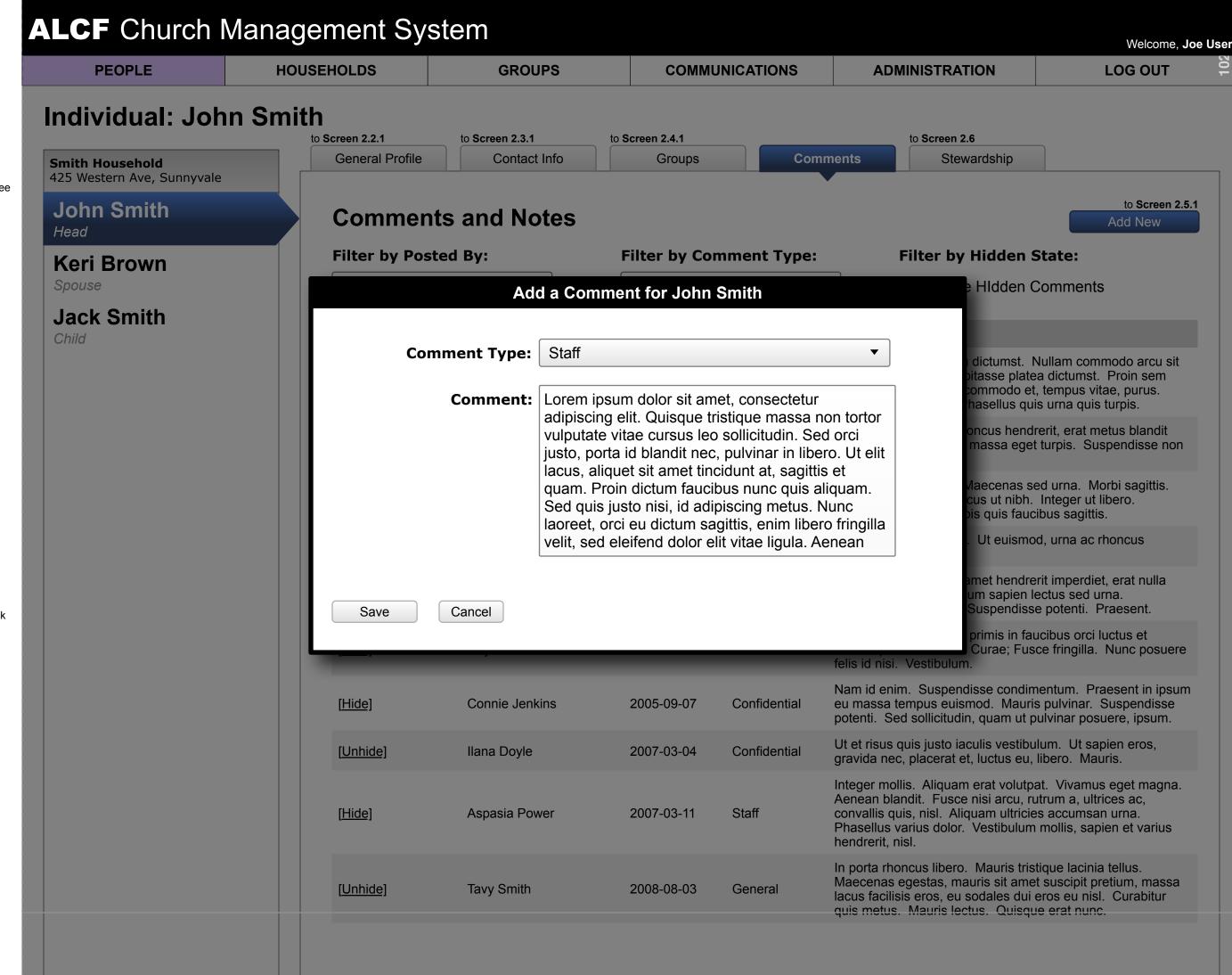
Edit an Individual - Comments

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

A user can only edit his/her own comment.

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

After hitting Save or Cancel, the user is taken back





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to Screen 2.6.1

Add New

to Screen 2.5

Prints a report of the list of transaction

- View All -

Comments

Stewardship

View an Individual – Stewardship

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

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

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

Funds can be one of the following:

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

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

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

• Imagine Campaign

Transaction Types can be one of the following:

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

Note that any pre-tax Corporate Match contribution should NOT be calculated in receipts used for 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)?

ChMS Main IA.graffle Fri Dec 11 2009 Page 23 of 25



Individual: John Smith



ALCF Church Management System

HOUSEHOLDS

to Screen 2.2.1

Head Keri Brown

Smith Household

Spouse

Jack Smith

Child

Stewardship	1
Otomarasinp	

General Profile

Date Range:

- View All -

WARDSNIP entries given the specified filtering criteria.

- View All -

Filter by Fund:

to Screen 2.4.1

Groups

GROUPS

Contact Info

to Screen 2.3.1

given the specified filtering criteria.

Print Report

Filter by Transaction Type:

View

View Entire Household:

View contributions by all household members

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

768 px

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

Edit Individual - Stewardship

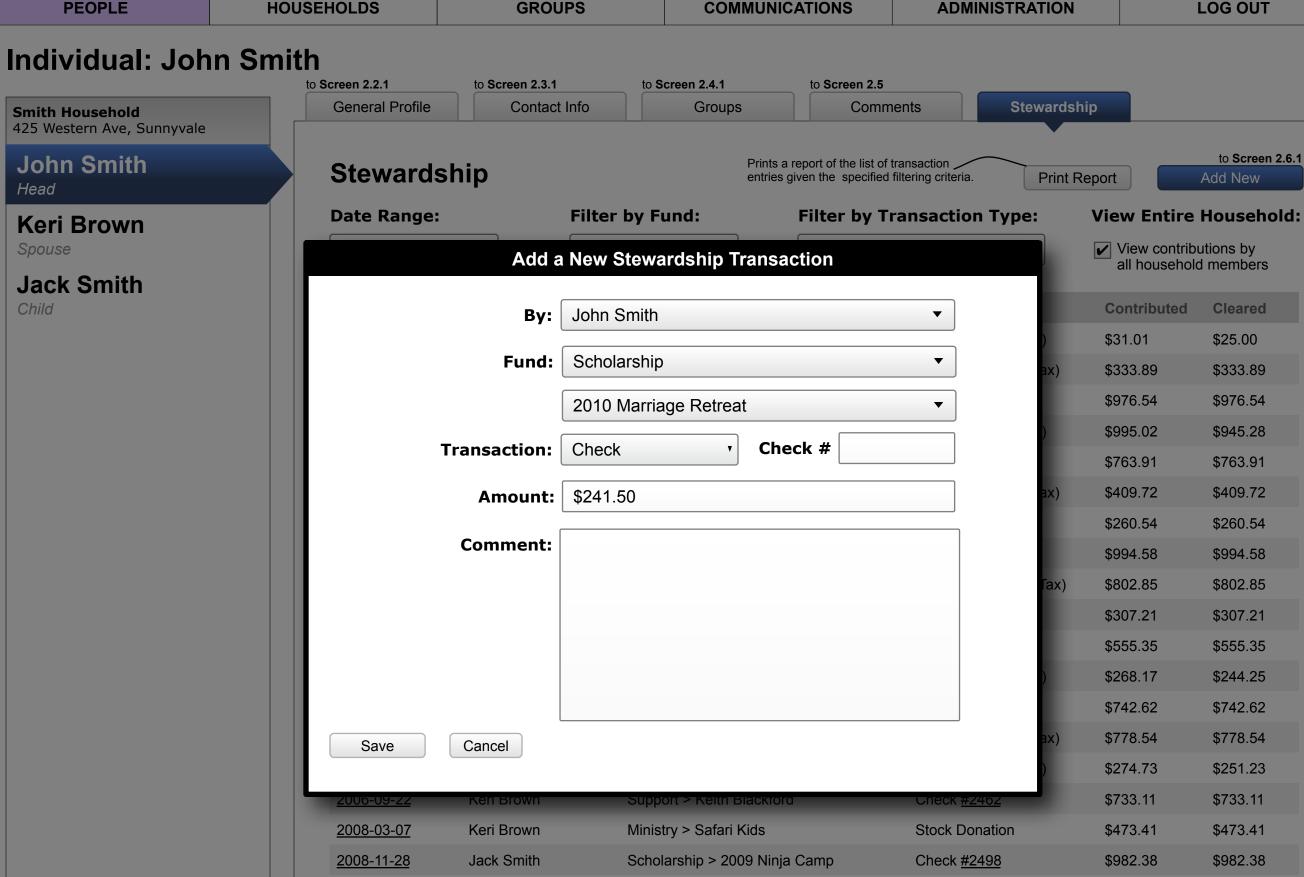
This dialog box allows the user to view, edit or even delete a transaction.

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

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

ALCF Church Management System

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



Ministry > Student Ministries

Tithes/Offering

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As Looking Tallers up of the Ang Velenter

768 px

Record last updated on February 23, 2009 by Doris Cohen

Keri Brown

Jack Smith

2008-12-29

2009-03-29

to Screen 2.6.1

Add New

Cleared

\$25.00

\$333.89

\$976.54

\$945.28

\$763.91

\$409.72

\$260.54

\$994.58

\$802.85

\$307.21

\$555.35

\$244.25

\$742.62

\$778.54

\$251.23

\$733.11

\$473.41

\$982.38

\$502.22

\$250.23

\$502.22

\$270.53

Corp. Match (Pre-Tax)

Credit Card (Online)

Search for a Household

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

Each individual can be a membership status of

Member

Non-Member/Tithe

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

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

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

ALCF Church Management System

<u>Duffy</u>

PEOPLE HOUSEHOLDS GROUPS LOG OUT COMMUNICATIONS ADMINISTRATION

Search for a Household

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

Results: Viewing people 1-20	of 2141.			<u>Previous</u> <u>Next</u>
First Name	LAST NAME v	Membership Status	Address	<u>City</u>
<u>Page</u>	Alexander	Non-Member	41098 Mill Valley Way	Anderson
Silvanus	<u>Barry</u>	Non-Member	1040 La Canada Flintridge Dr.	Hercules
<u>Susy</u>	<u>Barry</u>	Non-Member/Tithe	76207 Walnut Ave.	Irwindale
Walden	<u>Barry</u>	Non-Member	31558 Kerman Blvd.	East Palo Alto
Benedict	<u>Bennett</u>	Member	30811 Palm Springs Road	Bell
<u>Dandy</u>	<u>Brooks</u>	Member	88436 Mountain View Road	Commerce
<u>Burleigh</u>	<u>Buckley</u>	Non-Member	54019 Industry Ave.	Capitola
Bass	<u>Burke</u>	Non-Member/Tithe	59216 Reedley Dr.	Antioch
<u>Amorita</u>	<u>Chang</u>	Member	30200 Elk Grove St.	Agoura Hills
Worthington	<u>Coleman</u>	Non-Member/Tithe	25835 Emeryville Blvd.	Hillsborough
<u>Lula</u>	<u>Collins</u>	Non-Member	80939 Canyon Lake Dr.	Colton
Minna	<u>Cook</u>	Member	2279 Sonora Road	Lakeport
<u>Tilda</u>	<u>Cullen</u>	Non-Member	83531 Chico Blvd.	Biggs
Russell	Cunningham	Member	54957 Hughson Way	Laguna Niguel
<u>Abbie</u>	<u>Davis</u>	Non-Member/Tithe	56850 El Cajon Road	West Sacramento
Martie	<u>Davis</u>	Non-Member/Tithe	33924 Fullerton St.	La Mesa
<u>Toinette</u>	<u>Davis</u>	Member	41077 Dorris Dr.	Truckee
<u>Bowie</u>	<u>Doherty</u>	Non-Member	37431 Santa Monica St.	Salinas
<u>Griz</u>	<u>Donnelly</u>	Non-Member/Tithe	65033 Cudahy Blvd.	Blythe
<u>Tina</u>	<u>Doyle</u>	Member	77280 Redwood City Way	Indian Wells
				1

12497 La Habra Road

Non-Member/Tithe

Fort Bragg

<u>Beverly</u>