

Login Page

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

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

Passwords are their Windows Domain network password.

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**

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:

- Staff User
- ChMS Administrator

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

- CanViewStewardship
- CanViewConfidentialNotes

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

ALCF Church Management System

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**

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
- 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.

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>
Page	Alexander	Non-Member	41098 Mill Valley Way	Anderson
Silvanus	Barry	Non-Member	1040 La Canada Flintridge Dr.	Hercules
Susy	Barry	Non-Member/Tithe	76207 Walnut Ave.	Irwindale
Walden	Barry	Non-Member	31558 Kerman Blvd.	East Palo Alto
Benedict	Bennett	Member	30811 Palm Springs Road	Bell
Dandy	Brooks	Member	88436 Mountain View Road	Commerce
Burleigh	Buckley	Non-Member	54019 Industry Ave.	Capitola
Bass	Burke	Non-Member/Tithe	59216 Reedley Dr.	Antioch
Amorita	Chang	Member	30200 Elk Grove St.	Agoura Hills
Worthington	Coleman	Non-Member/Tithe	25835 Emeryville Blvd.	Hillsborough
Lula	Collins	Non-Member	80939 Canyon Lake Dr.	Colton
Minna	Cook	Member	2279 Sonora Road	Lakeport
Tilda	Cullen	Non-Member	83531 Chico Blvd.	Biggs
Russell	Cunningham	Member	54957 Hughson Way	Laguna Niguel
Abbie	Davis	Non-Member/Tithe	56850 El Cajon Road	West Sacramento
Martie	Davis	Non-Member/Tithe	33924 Fullerton St.	La Mesa
Toinette	Davis	Member	41077 Dorris Dr.	Truckee
Bowie	Doherty	Non-Member	37431 Santa Monica St.	Salinas
Griz	Donnelly	Non-Member/Tithe	65033 Cudahy Blvd.	Blythe
Tina	Doyle	Member	77280 Redwood City Way	Indian Wells
Beverly	Duffy	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 single household would
be displayed on **Screen 2.2**
• Individual that is not part of any households (e.g.
single person) would be displayed on **Screen 2.2.1**
• Individual that is part of multiple households would
be displayed on **Screen 2.2.2**

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

Position in household can be one of the following:
• Head
• Spouse
• Child
• Parent (e.g. for a household with an adult Head of
Household, "Parent" would be the grandparent in
that household)
• Other

There can only be one Head of Household.

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

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

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

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

Gender: Male



Edit

to Screen 2.2.5

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

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

Household: Head of the Smith Household to Screen 3.2

Details

to Screen 2.3.1

Primary Contact Info: 425 Western Avenue
Sunnyvale, CA 94086

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
Not Part of Any Household

See [Screen 2.2](#) for notes.

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

Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith

Individual

General Profile

to Screen 2.3.2

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

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

Marital Status:

Single

Household:

None – Individual

to Screen 3.2

Details


to Screen 2.3.1

Primary Contact Info:

425 Western Avenue
Sunnyvale, CA 94086

408-555-1212
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 Jan 06 2010
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 ALCF
Following the example of Jesus Christ

768 px

+240 px

View an Individual – General Profile Tab
Multiple Households

See **Screen 2.2** for notes.

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

Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

Keri Smith
Head

Chris Smith
Spouse

John Smith
Child

Adams Household
123 Main Street, Palo Alto

Westfield Household
1852 Mary Ave, Sunnyvale

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: Jonathan Mark Smith, Jr.
Goes By: John Smith
Date of Birth: March 1, 2007 (2 years old)
Gender: Male



Edit

to Screen 2.2.6

Edit

to Screen 2.2.4

Membership Status: Non-Member

Edit

to Screen 2.2.5

Marital Status: Single
Households: Child in the [Smith Household](#)
Child in the [Adams Household](#)
Child in the [Westfield Household](#)

to Screen 3.2

Details

to Screen 2.3.1

Primary Contact Info: 425 Western Avenue
Sunnyvale, CA 94086


408-555-1212
jsmith@gmail.com

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

[View Change Log](#)

Clicking on any of the other households will refresh
the accordion, showing the members of that
household and the individual's role in that
household.

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A Living Fellowship of Jesus Christ

768 px

+240 px

to **Screen 2.6**

Stewardship

+240 px

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**

ALCF Church Management System

Welcome, Joe User

PEOPLE

HOUSEHOLDS

GROUPS

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LOG 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

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.

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

Contact Information

Groups

Comments

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

to Screen 2.3.1

to Screen 2.4.1

to Screen 2.5

to Screen 2.6



Edit
to Screen 2.2.5

Edit Membership Information

Edit a Prior Membership

Membership Started: mm/dd/yyyy

Membership Ended: mm/dd/yyyy


Update

Cancel

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Following the example of Jesus Christ

768 px

+240 px

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 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 "Merge into a single household?"

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

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

Edit

Full Name: Dr. Jonathan Mark Smith, III

Goes By: John Smith

Edit

to Screen 2.2.3

to Screen 2.3.1

to Screen 2.4.1

to Screen 2.5

to Screen 2.6

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Family Information

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

Update

Cancel

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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.

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

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


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


[View Change Log](#)


Edit Individual's Photograph

Select an Image:









Upload New Image:


Browse...

Update

Cancel

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

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Following the vision of Jesus Christ

768 px

+240 px

View an Individual – Contact Information Tab
Single Household

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

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

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

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

Telephone Types for "Phone Information" can be:

- Home (only editable via Screen 2.3.2)
- Mobile
- Work
- 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**.

PEOPLE

HOUSEHOLDS

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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

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
Previous Home	<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>

Other Contact Information for John Smith

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>

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

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LOG OUT

102

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

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	95128	408-555-1725

to Screen 2.3.3

Add New

to Screen 2.3.5

Add New

to Screen 2.3.6

Add New

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

Other Contact Information for John Smith

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

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

ALCF Church Management System

Welcome, Joe User

PEOPLEHOUSEHOLDSGROUPSCOMMUNICATIONSADMINISTRATIONLOG OUT

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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 multi-person household.

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

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
[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 2.3.3

Add New

to Screen 2.3.5

Add New

Address

smith@gmail.com

1231@yahoo.com

john.f.smith@company.org

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

Other Contact Information for John Smith

to Screen 2.3.6

Add New

Address Information

Address Type:Current Work

Address 1:2810 Coleman Avenue

Address 2:

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

UpdateCancel

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ALCF

768 px

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View Change Log

+240 px

to **Screen 2.6**

+240 px

ALCF Church Management System

Welcome, Joe User

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PEOPLE

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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 ???.

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

Individual: John Smith

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

Smith Household

425 Western Ave, Sunnyvale

John Smith

Head

Keri Brown

Spouse

Jack Smith

Child

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
[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 2.3.3

Add New

Address	Phone
Home	408-281-2381
Mobile	415-552-9138
Work	650-228-1248
Work	650-228-1200
Other	626-291-2481

Other Contact Information for John Smith

to Screen 2.3.5

Add New

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

Edit Other Contact Information

Other Contact Information

Contact Info Type: Twitter ID

Value: john_smith_417

Update

Cancel


Record last updated on February 23, 2009 by Doris Cohen

View Change Log

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768 px

+240 px

PEOPLE

HOUSEHOLDS

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ADMINISTRATION

LOG OUT

View an Individual – Groups

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

Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

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.

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 2.4.2

Add New

Ministry Participation

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

Communication Lists

to Screen 2.4.3

Add New

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

Edit Individual — Ministry Participation

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

In order to better manage ministries and sub-ministries, ministry drop-downs could be hierarchical.

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 appear over the date.

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.

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

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 > Mountain View 2</u>	Participant	January 4, 2004 - Present
<u>Real World Young Adults</u>	Small Group Leader	September 24, 2007 - May 2008

Edit Ministry Participation

Ministry: Growth Groups

Sub-Ministry: Mountain View 2

Role: Participant

Participation Started

Participation Ended

May 1, 2004

Enter a Date

Mar 4, 1999

Apr 24, 2001

Jul 23, 1994

Sep 15, 1997

Jul 23, 1994

Sep 15, 1997

Save

Cancel

Add a Membership Period

ChMS Main IA.graffle
Wed Jan 06 2010
Page 19 of 33

ALCF

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

Edit Individual — Communication List

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

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

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 > 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 2.4.3

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

"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 2.5.1**

"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

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 2.6

Stewardship

Comments

to Screen 2.5.1

Add New

Comments and Notes

Filter by Posted By:

- View All -

Filter by Comment Type:

- View All -

Filter by Hidden State:

☒ Include Hidden Comments

Edit / Hide	Posted By	DATE v	Type	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.
[Unhide]	Tavy Smith	2008-08-03	General	In porta rhoncus libero. Mauris tristique lacinia tellus. Maecenas egestas, mauris sit amet suscipit pretium, massa lacus facilisis eros, eu sodales dui eros eu nisl. Curabitur quis metus. Mauris lectus. Quisque erat nunc.

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.

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 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 ProfileContact InfoGroupsCommentsStewardship

Comments and Notes

Filter by Posted By:Filter by Comment Type:Filter by Hidden State:

Add a Comment for John Smith

Comment Type:Staff

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

SaveCancel

[Hide]

Connie Jenkins2005-09-07ConfidentialNam id enim. Suspendisse condimentum. Praesent in ipsum eu massa tempus euismod. Mauris pulvinar. Suspendisse potenti. Sed sollicitudin, quam ut pulvinar posuere, ipsum.

[Unhide]

Ilana Doyle2007-03-04ConfidentialUt et risus quis justo iaculis vestibulum. Ut sapien eros, gravida nec, placerat et, luctus eu, libero. Mauris.

[Hide]

Aspasia Power2007-03-11StaffInteger mollis. Aliquam erat volutpat. Vivamus eget magna. Aenean blandit. Fusce nisi arcu, rutrum a, ultrices ac, convallis quis, nisl. Aliquam ultricies accumsan urna. Phasellus varius dolor. Vestibulum mollis, sapien et varius hendrerit, nisl.

[Unhide]

Tavy Smith2008-08-03GeneralIn 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 quis metus. Mauris lectus. Quisque erat nunc.

to Screen 2.2.1to Screen 2.3.1to Screen 2.4.1to Screen 2.6to Screen 2.5.1

Add New

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)?

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

Stewardship

to Screen 2.6.1

Add New

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

Print Report

Stewardship

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
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 #2141	\$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 #2251	\$307.21	\$307.21
2004-10-07	Jack Smith	Ministry > Safari Kids	Check #2376	\$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 #2399	\$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 #2462	\$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 #2498	\$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

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

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 2.6.1

Add New

Stewardship

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

Print Report

Date Range:

Filter by Fund:

Filter by Transaction Type:

View Entire Household:

Add a New Stewardship Transaction

By: John Smith

Fund: Scholarship

2010 Marriage Retreat

Transaction: Check Check #

Amount: \$241.50

Comment:

Save

Cancel

☒ View contributions by all household members

ContributedCleared

\$31.01\$25.00

ax)\$333.89\$333.89

\$976.54\$976.54

)\$995.02\$945.28

\$763.91\$763.91

ax)\$409.72\$409.72

\$260.54\$260.54

\$994.58\$994.58

(ax)\$802.85\$802.85

\$307.21\$307.21

\$555.35\$555.35

)\$268.17\$244.25

\$742.62\$742.62

ax)\$778.54\$778.54

)\$274.73\$251.23

2006-09-22Keri BrownSupport > Keith BlackfordCheck #2462\$733.11\$733.11

2008-03-07Keri BrownMinistry > Safari KidsStock Donation\$473.41\$473.41

2008-11-28Jack SmithScholarship > 2009 Ninja CampCheck #2498\$982.38\$982.38

2008-12-29Keri BrownMinistry > Student MinistriesCorp. Match (Pre-Tax)\$502.22\$502.22

2009-03-29Jack SmithTithes/OfferingCredit Card (Online)\$270.53\$250.23

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

Individuals may be part of multiple households.

Search for a Household

Search / Filter List

- View All Cities -

Refresh List

 refreshes table below

Results: Viewing households 1-20 of 2141. [Previous](#) | [Next](#)

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

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**.

ALCF Church Management System

Welcome, Joe User

PEOPLE

HOUSEHOLDS

GROUPS

COMMUNICATIONS

ADMINISTRATION

LOG OUT

Household: 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	John Smith	jsmith@gmail.com	415-555-1212
Spouse	Keri Brown	kbrown@gmail.com	415-555-2211
Child	Jack Smith		

Home Address and Phone for the Smith Household

to Screen 3.4

Add New

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

to Screen 3.5

Add an Individual

to Screen 3.6

Remove an Individual

to Screen 3.7

Split this Household

to Screen 3.8

Merge Households

ChMS Main IA.graffle
Wed Jan 06 2010
Page 26 of 33



ALCF

Following the vision of Jesus Christ

768 px

+240 px

PEOPLE

HOUSEHOLDS

GROUPS

COMMUNICATIONS

ADMINISTRATION

LOG OUT

102

Household: Smith Household

Household Members

to Screen 3.3

Edit Roles

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

Edit Household Roles

John Smith:

Head

Karen Brown:

Spouse

Jack Smith:

Child

Save

Cancel

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

to Screen 3.5

Add an Individual

to Screen 3.6

Remove an Individual

to Screen 3.7

Split this Household

to Screen 3.8

Merge Households

PEOPLE

HOUSEHOLDS

GROUPS

COMMUNICATIONS

ADMINISTRATION

LOG OUT

102

Household: 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

Merge Households

PEOPLE

HOUSEHOLDS

GROUPS

COMMUNICATIONS

ADMINISTRATION

LOG OUT

102

Household: 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

Role: Parent

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

Merge 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
--------	------------	--------	----------------	----------------	---------

Household: 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 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

Merge Households

Household: Smith Household

Household Members

to Screen 3.3

Edit Roles

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

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). If you wish to remove a household member who's only household is this household, you will need to click on **"Split This Household"**.

Individual to Remove: Jack Smith

Remove

Cancel

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

to Screen 3.5

Add an Individual

to Screen 3.6

Remove an Individual

to Screen 3.7

Split this Household

to Screen 3.8

Merge Households

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

COMMUNICATIONS

ADMINISTRATION

LOG OUT

102

Household: 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?

Primary Home Phone: 650-555-1212

☒

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

Merge Households

Edit Household – Split Households

This will merge data from another household with this household, combining both into a single, combined household.

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: Smith Household

Household

Role

Head

Spouse

Child

Home Address

Current

Current Home

[set as current]

[set as current]

Merge Households

Search for a Household or Individual to Merge

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 Merged Household: John Smith

Merge

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
Merge Households