Login Page

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

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

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

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

ALCF Church Management System

ChMS Staff Login

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

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

Username or Email: [   ]

Password: [   ]

[Log In]

goes to **Screen 1.1**

1024 px

+240 px

768 px

Main Menu

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

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

There are two roles for Staff Members who are using the ChMS Membership Subsystem:
• View-Only User (similar to Staff user, but without any edit privileges *whatsoever*)
• Staff User
• ChMS Administrator

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

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

ALCF Church Management System

| PEOPLE | HOUSEHOLDS | GROUPS | COMMUNICATIONS | ADMINISTRATION | LOG OUT |

Main Menu

Quick Search: People

First Name: [   ]

Last Name: [   ]

[Search for Person] goes to **Screen 2.1**

Quick Search: Groups

Name: [   ]

[Search for Group] goes to **Screen 4.1**

[People] Manage individual membership records
goes to **Screen 2.1**

[Households] Manage household records
goes to **Screen 3.1**

[Groups] Manage group records
goes to **Screen 4.1.1**

[Communications] Manage communication lists
goes to **Screen 5.1**

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

[Administration] Manage administration tasks for the ALCF ChMS
goes to **Screen 6.1**

Search for an Individual

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

Each individual can be a membership status of type:
• Member
• Child of Member
• Former Member
• None

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

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

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

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

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

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

ALCF Church Management System

Welcome, **Joe User**

| PEOPLE | HOUSEHOLDS | GROUPS | COMMUNICATIONS | ADMINISTRATION | LOG OUT |

Search for an Individual

Search / Filter List

| First Name | Last Name | - View All Statuses - ▼ | Refresh List | refreshes table below |

Results: Viewing people 1-20 of 2141.

Previous | Next

First Name	LAST NAME v	Membership Status	Address	City
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

ChMS Main IA.graffle
Thu Feb 04 2010
Page 3 of 55

ALCF

768 px

+240 px

View an Individual – General Profile Tab Single Household

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

Depending on the type of individual, the screen the individual would show up on would be on one of the following wireframes:
• Individual that is part of a multi-person household would be displayed on **Screen 2.2**
• Individual that is part of a single-person households (e.g. single person) would be displayed on **Screen 2.2.1**
• Individual that has no household record (e.g. no home address on file) would be displayed on **Screen 2.2.1.1**
• Individual that is part of multiple households would be displayed on **Screen 2.2.2**

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

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

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

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

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

There can only be one Head of Household.

Clicking on any of the names will take the user to the **Screen 2.2**, **Screen 2.2.1**, **Screen 2.2.1.1** or **Screen 2.2.2** for that individual, depending on the individual him/herself according to the rules detailed above.

ALCF Church Management System

Welcome, **Joe User**

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Individual: John Smith

	to **Screen 2.3.1**	to **Screen 2.4.1**	to **Screen 2.5**	to **Screen 2.6**	to **Screen 2.9**
General Profile	Contact Information	Groups	Comments	Stewardship	Attributes

John Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Wife

Jack Smith
Son

[Edit]
to **Screen 2.2.3**

Full Name:	Dr. Jonathan Mark Smith, III
Goes By:	John Smith
Date of Birth:	March 1, 1977 (32 years old)
Gender:	Male
Deceased:	Yes

[Edit]
to **Screen 2.2.4**

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

Prior membership from January 15, 2002 - March 28, 2003
Prior membership from April 12, 1996 - November 4, 1999

[Edit]
to **Screen 2.2.5.1**

[Edit]
to **Screen 2.2.5.2**

Family Information: Married, to <u>Keri Brown</u> on June 24, 2006 (3 years)
Sister: <u>Joanna Smith-Stevens</u>
Son: <u>Jack Smith</u>
Mother: <u>Percilla Smith</u>
Father: <u>Don Smith</u>

Household: Head of the <u>John Smith Household</u>   to **Screen 3.2**

[Details]
to **Screen 2.3.1**

Primary Contact Info: 408-555-1212
<u>jsmith@gmail.com</u>

[Edit]
to **Screen 2.2.5**

[Merge Records]   to **Screen 2.7**

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

View Change Log

View an Individual – General Profile Tab
Single-Person Household

See **Screen 2.2** for notes.

ALCF Church Management System

Welcome, **Joe User**

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Individual: John Smith

to **Screen 2.3.1** to **Screen 2.4.1** to **Screen 2.5** to **Screen 2.6** to **Screen 2.9**

General Profile	Contact Information	Groups	Comments	Stewardship	Attributes

John Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

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**

Edit
to **Screen 2.2.5.1**

Edit
to **Screen 2.2.5.2**

Family Information: Single
Sister: Joanna Smith-Stevens
Son: Jack Smith
Mother: Percilla Smith
Father: Don Smith

Household: Head of the John Smith Household (Single Person Household)
to **Screen 3.2**

Details
to **Screen 2.3.1**

Primary Contact Info: 408-555-1212
jsmith@gmail.com

Merge Records   to **Screen 2.7**

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

View Change Log

View an Individual – General Profile Tab
No Household on File

See **Screen 2.2** for notes.

There may be several reasons why we have an individual that has no household information on file:
• They signed up at a ministry event using only an email address and/or phone number
• They sent in a tithe without any home address
• The individual is homeless and does not have a home address, only a contact address (e.g. a shelter and/or a PO Box)

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

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

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

ALCF Church Management System

Welcome, **Joe User**

| PEOPLE | HOUSEHOLDS | GROUPS | COMMUNICATIONS | ADMINISTRATION | LOG OUT |

Individual: John Smith

to **Screen 2.3.1.1**   to **Screen 2.4.1**   to **Screen 2.5**

| **General Profile** | Contact Information | Groups | Comments |

No Household on File
Create One   to **Screen 2.8**

John Smith

[Edit]
to **Screen 2.2.3**

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

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

Membership Status: Non-Member

[Edit]
to **Screen 2.2.5**

[Edit]
to **Screen 2.2.5.2**

Family Information: Single
Sister: Joanna Smith-Stevens
Son: Jack Smith
Mother: Percilla Smith
Father: Don Smith

Household: No household record on file. Create One
to **Screen 2.8**

[Details]
to **Screen 2.3.1.1**

Primary Contact Info: 408-555-1212
jsmith@gmail.com

[Edit]
to **Screen 2.2.5**

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

View Change Log

[Merge Records]   to **Screen 2.7**

View an Individual – General Profile Tab
Multiple Households

See **Screen 2.2** for notes.

ALCF Church Management System

Welcome, **Joe User**

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Individual: John Smith

Keri Smith Household
425 Western Ave, Sunnyvale

Keri Smith
Head

Chris Smith
Husband

John Smith
Son

Merge Records   to **Screen 2.7**

Rick Adams Household
123 Main Street, Palo Alto

Amber Westfield Household
1852 Mary Ave, Sunnyvale

General Profile	Contact Information	Groups	Comments	Stewardship	Attributes

to **Screen 2.3.1** | to **Screen 2.4.1** | to **Screen 2.5** | to **Screen 2.6** | to **Screen 2.9**

Edit
to **Screen 2.2.3**

Full Name: Jonathan Mark Smith, Jr.
Goes By: John Smith

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

Edit
to **Screen 2.2.4**

Membership Status: Child of Member

Edit
to **Screen 2.2.6**

Edit
to **Screen 2.2.5**

Family Information: Single
Mother: <u>Keri Smith</u>
Father: <u>Chris Smith</u>

Edit
to **Screen 2.2.5.2**

Households: Son in the <u>Keri Smith Household</u>   to **Screen 3.2**
Son in the <u>Rick Adams Household</u>
Minor in the <u>Amber Westfield Household</u>

Details
to **Screen 2.3.1**

Primary Contact Info: 408-555-1212
<u>jsmith@gmail.com</u>

*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.

Edit an Individual – General Information

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

ALCF Church Management System

Welcome, **Joe User**

| 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 2.3.1**
Contact Information

to **Screen 2.4.1**
Groups

to **Screen 2.5**
Comments

to **Screen 2.6**
Stewardship

General Profile

Edit

to **Screen 2.2.5**

Edit Name Information

Name Information

Title: Dr.

First Name: Jonathan

Middle Name or Initial: Mark

Last Name: Smith

Suffix: III

Nickname: Johnny

Prior Last Name(s): Patterson, Brown, Richardson

Mailing Label: Johnny Smith

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

Biographical Information

Date of Birth allows the user to enter in a full Month/
Day/Year combination. If a date is entered, all three
are required.

Date of Birth: May 2 1977   **Approximate:** ☐ Check if Year is Approximate

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

Gender: Male

Deceased: No

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.

Update   Cancel

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

View Change Log

ChMS Main IA.graffle
Thu Feb 04 2010
Page 8 of 55

ALCF

768 px

+240 px

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**

ALCF Church Management System

Welcome, **Joe User**

| PEOPLE | HOUSEHOLDS | GROUPS | COMMUNICATIONS | ADMINISTRATION | LOG OUT |

Individual: John Smith

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

| **General Profile** | Contact Information | Groups | Comments | Stewardship |

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

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
May 1, 2004	Enter a Date
Mar 4, 1999	Apr 24, 2001
Jul 23, 1994	Sep 15, 1997
Jul 23, 1994	Sep 15, 1997

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

View Change Log

Edit an Individual – Membership Dates

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

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

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

If entering a **Membership Ended** date, then **Reason for Termination** will appear with the following options:
• Moved out of the area
• Deceased
• Other

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

This list of reasons is managed by the ChMS Administrator.

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

ALCF Church Management System

Welcome, **Joe User**

| PEOPLE | HOUSEHOLDS | GROUPS | COMMUNICATIONS | ADMINISTRATION | LOG OUT |

Individual: John Smith

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

| **General Profile** | Contact Information | Groups | Comments | Stewardship |

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

Edit
to **Screen 2.2.3**

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

Member Status: Member
Date of Birth: March 1, 1977 (32 years old)
Gender: Male

Edit
to **Screen 2.2.5**

Edit Membership Information

Edit a Prior Membership

Membership Started: [mm/dd/yyyy]

Membership Ended: [mm/dd/yyyy]

Reason for Termination: [- Select One - ▼]

Update   Cancel

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

View Change Log

Edit an Individual – Marriage Information

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

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

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

Married Status contains the following options:
• None or Not Defined
• Single
• Married
• Separated

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

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

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

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

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

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

ALCF Church Management System

Welcome, **Joe User**

| PEOPLE | HOUSEHOLDS | GROUPS | COMMUNICATIONS | ADMINISTRATION | LOG OUT |

Individual: John Smith

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

| General Profile | Contact Information | Groups | Comments | Stewardship |

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

Edit
to **Screen 2.2.3**

Full Name: Dr. Jonathan Mark Smith, III

Goes By: John Smith

Edit
to **Screen 2.2.5**

Edit Marriage Status

Marriage Status

Marital Status: Married ▼

Married Since: mm/dd/yyyy 📅

Married To: Keri Brown

Select	First Name	Last Name	Address	City
⦿	Keri	Brown	425 Western Ave	Sunnyvale
○	Keri	Brown-Smith	285 Maple Drive, Apt. #3	Hayward
○	Keri Anna	Brownelle	1802 Pasqualito Drive	Antioch
○	*None of the Above*			

Update   Cancel

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

View Change Log

Edit an Individual – Family Information

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

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

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

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

The relationship drop down consists of the following options:
• Sibling
• Parent
• Child

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

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

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

ALCF Church Management System

Welcome, **Joe User**

| PEOPLE | HOUSEHOLDS | GROUPS | COMMUNICATIONS | ADMINISTRATION | LOG OUT |

Individual: John Smith

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

| General Profile | Contact Information | Groups | Comments | Stewardship |

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

Edit
to Screen 2.2.3

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

Edit
to **Screen 2.2.5**

Edit Family Information

Family Relationships

Edit	First Name	Last Name	Address	Relationship
Edit	Kristine	Smith	4241 Maple Drive, Sunnyvale	Sister
Edit	Patricia	Smith-Patterson	123 Main Street, Palo Alto	Sister
Edit	Jack	Smith	425 Western Ave, Sunnyvale	Son

Related To: Kristine Smith

Relationship: Sibling ▼

Remove Relationship   Update   Cancel

Add a New Relationship   Close

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

View Change Log

Edit an Individual – Photograph

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

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

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

ALCF Church Management System

Welcome, **Joe User**

| PEOPLE | HOUSEHOLDS | GROUPS | COMMUNICATIONS | ADMINISTRATION | LOG OUT |

Individual: John Smith

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

| General Profile | Contact Information | Groups | Comments | Stewardship |

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

Edit
to **Screen 2.2.3**

Full Name:	Dr. Jonathan Mark Smith, III
Goes By:	John Smith
Member Status:	Member
Date of Birth:	March 1, 1977 (32 years old)
Gender:	Male

Edit
to **Screen 2.2.5**

Edit Individual's Photograph

Select an Image:

Jan 4 2004   Feb 9 2008   Feb 12 2008   May 25 2009

Upload New Image: [   ] Browse...

Update   Cancel

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

View Change Log

View an Individual – Contact Information Tab 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)
• Temporary
• Other

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

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

Telephone Types for "Phone Information" can be:
• Home (only editable via Screen 2.3.2)
• Mobile
• Work
• Fax
• Other

Only one phone can be set as "Primary".

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

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

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

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 2.5** to **Screen 2.6** to **Screen 2.9**

General Profile	Contact Info	Groups	Comments	Stewardship	Attributes

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

Phone Numbers for John Smith

to **Screen 2.3.4**
[Add New]

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

Email Addresses

to **Screen 2.3.5**
[Add New]

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

Mailing Address
Current Home (425 Western Avenue)

Stewardship Receipt Address
Current Work (401 El Camino Real)

Contact Preferences
• Okay to Mail
• Okay to Email
• NOT Okay to Telephone

to **Screen 2.3.7**
[Edit]

Other Contact Information

to **Screen 2.3.6**
[Add New]

Contact Type	Value
AIM Screen Name	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

**View an Individual – Contact Information Tab
No Household**

See **Screen 2.3.1** for more information.

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

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

ALCF Church Management System

Welcome, **Joe User**

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Individual: John Smith

to **Screen 2.2.1.1**   to **Screen 2.4.1**   to **Screen 2.5**

No Household
Create One   to **Screen 2.8**

John Smith
Individual

General Profile	Contact Info	Groups	Comments

to **Screen 2.3.3**

Non-"Current Home" Addresses for John Smith

[Add New]

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

to **Screen 2.3.4**

Phone Numbers for John Smith [Add New]

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

to **Screen 2.3.5**

Email Addresses [Add New]

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

to **Screen 2.3.6**

Other Contact Information for John Smith [Add New]

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

768 px

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

ALCF

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

The concept of an "Invalid Address" is only applicable on Current addresses.

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

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

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

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

ALCF Church Management System

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Individual: John Smith

to **Screen 2.2.1** | to **Screen 2.4.1** | to **Screen 2.5** | to **Screen 2.6** | to **Screen 2.9**

General Profile	Contact Info	Groups	Comments	Stewardship	Attributes

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	INVALID

Edit Household – Home Address and Phone

Home Address

Current/Previous: [Current Home Address ▾]   ☐ Invalid Address

Address 1: [425 Western Ave.]

Address 2: [ ]

City, State, Postal Code: [City] [- State - ▾] [Postal Code]

Primary?

Primary Home Phone: [650-555-1212]   ◉

Alternate Home Phone: [650-824-1241]   ○

Alternate Home Phone: [650-555-1234]   ○

Add Another

Delete   **Update**   Cancel

Other Contact Information

to **Screen 2.3.6** — Add New

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

to **Screen 2.3.5** — Add New

il Address

smith@gmail.com

1231@yahoo.com

.smith@company.org

venue)

Current Work (401 El Camino Real)

Contact Preferences
• Okay to Mail
• Okay to Email
• NOT Okay to Telephone

to **Screen 2.3.7** — Edit

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

768 px

Edit an Individual – Other Address

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

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

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

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

ALCF Church Management System

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Individual: John Smith

to **Screen 2.2.1**   to **Screen 2.4.1**   to **Screen 2.5**   to **Screen 2.6**   to **Screen 2.9**

General Profile	Contact Info	Groups	Comments	Stewardship	Attributes

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	**INVALID**
[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

Edit Other Address

Address Information

Address Type:	Current Work ▼ Until: mm/dd/yyyy 📅
Address 1:	2810 Coleman Avenue
Address 2:	
City, State, Postal Code:	City - State - ▼ Postal Code

Delete   **Update**   Cancel

[set as primary]	Mobile	415-552-9138	[set as primary]	john.t.smith@company.org
[set as primary]	Work	650-228-1248		
[set as primary]	Work	650-228-1200		
[set as primary]	Other	626-291-2481		

to **Screen 2.3.5**
Add New

...l Address

...smith@gmail.com

...1231@yahoo.com

Mailing Address
Current Home (425 Western Avenue)

Stewardship Receipt Address
Current Work (401 El Camino Real)

Contact Preferences
• Okay to Mail
• Okay to Email
• NOT Okay to Telephone

Other Contact Information

to **Screen 2.3.6**
Add New

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

to **Screen 2.3.7**
Edit

768 px

ChMS Main IA.graffle
Thu Feb 04 2010
Page 17 of 55

ALCF

+240 px

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

View Change Log

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 non-home 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**.

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 2.5** to **Screen 2.6** to **Screen 2.9**

General Profile	Contact Info	Groups	Comments	Stewardship	Attributes

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	**INVALID**
[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

Edit Phone Number

Phone Information

Phone Type: Work ▼

Primary? No ▼

Phone Number: 408-555-2123

Delete   **Update**   Cancel

[set as primary]   Home   408-281-2381
[set as primary]   Mobile   415-552-9138
[set as primary]   Work   650-228-1248
[set as primary]   Work   650-228-1200
[set as primary]   Other   626-291-2481

to **Screen 2.3.5**
Add New

Email Address

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

Mailing Address
Current Home (425 Western Avenue)

Stewardship Receipt Address
Current Work (401 El Camino Real)

Contact Preferences
• Okay to Mail
• Okay to Email
• NOT Okay to Telephone

Other Contact Information

to **Screen 2.3.6**
Add New

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

to **Screen 2.3.7**
Edit

768 px

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

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**.

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 2.5**   to **Screen 2.6**   to **Screen 2.9**

General Profile	Contact Info	Groups	Comments	Stewardship	Attributes

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

to **Screen 2.3.2**
Add New

Home Address and Phone for the Smith Household

Current	Address	City/State	Zip Code	Home Phone	
Current Home	425 Western Ave	Sunnyvale, CA	94086	408-555-1212	**INVALID**
[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 2.3.3**
Add New

Other Addresses for John Smith

Edit Email Address

Email Information

Primary? | No ▼

Email Address: | john.smith@gmail.com

Delete   **Update**   Cancel

[set as primary]	Home	408-281-2381
[set as primary]	Mobile	415-552-9138
[set as primary]	Work	650-228-1248
[set as primary]	Work	650-228-1200
[set as primary]	Other	626-291-2481

to **Screen 2.3.5**
Add New

l Address

smith@gmail.com

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

Mailing Address
Current Home (425 Western Avenue)

Stewardship Receipt Address
Current Work (401 El Camino Real)

Contact Preferences
• Okay to Mail
• Okay to Email
• NOT Okay to Telephone

to **Screen 2.3.6**
Add New

Other Contact Information

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

to **Screen 2.3.7**
Edit

768 px

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

102

+240 px

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**.

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 2.5** to **Screen 2.6** to **Screen 2.9**

| General Profile | Contact Info | Groups | Comments | Stewardship | Attributes |

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	**INVALID**
[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

Edit Other Contact Information

Other Contact Information

Contact Info Type: Twitter ID ▾

Value: john_smith_417

Delete   Update   Cancel

[set as primary]	Home	408-281-2381
[set as primary]	Mobile	415-552-9138
[set as primary]	Work	650-228-1248
[set as primary]	Work	650-228-1200
[set as primary]	Other	626-291-2481

to **Screen 2.3.5** Add New

il Address

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

Mailing Address
Current Home (425 Western Avenue)

Stewardship Receipt Address
Current Work (401 El Camino Real)

Contact Preferences
• Okay to Mail
• Okay to Email
• NOT Okay to Telephone

Other Contact Information

to **Screen 2.3.6** Add New

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

to **Screen 2.3.7** Edit

768 px

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

View Change Log

Edit an Individual – Contact Preferences

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

"Address" dropdowns can be:
• Current Home
• Current Work
• Any "Other" addresses defined for the individual
• Any "Temporary" addresses defined for the individual
• None

"Okay to ..." dropdowns can be:
• Yes
• No

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

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 2.5** to **Screen 2.6** to **Screen 2.9**

General Profile	Contact Info	Groups	Comments	Stewardship	Attributes

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	**INVALID**
[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

Edit Contact Preferences

Contact Preferences

Mailing Address: [Current Home (425 Western) ▼]

Stewardship Receipts Address: [Current Work (4901 El Camino) ▼]

Okay to Mail: [Yes ▼]

Okay to Email: [Yes ▼]

Okay to Telephone: [No ▼]

[**Update**] [Cancel]

to **Screen 2.3.5**   Add New

il Address

smith@gmail.com

1231@yahoo.com

.smith@company.org

[set as primary]   Other   626-291-2481

Current Home (425 Western Avenue)

Stewardship Receipt Address
Current Work (401 El Camino Real)

Contact Preferences
• Okay to Mail
• Okay to Email
• NOT Okay to Telephone

Other Contact Information

to **Screen 2.3.6**   Add New

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

to **Screen 2.3.7**   Edit

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

View Change Log

768 px

View an Individual – Groups

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

Clicking on any of the ministry names will allow the user to edit role(s) and date(s) of involvement for this individual with that ministry on **Screen 2.4.3**.

ALCF Church Management System

Welcome, **Joe User**

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** | to **Screen 2.3.1** | | to **Screen 2.5** | to **Screen 2.6** | to **Screen 2.9**

General Profile	Contact Info	Groups	Comments	Stewardship	Attributes

Ministry Participation

to **Screen 2.4.2**
Add New

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

Communication Lists

to **Screen 2.4.4**
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

768 px

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

View Change Log

Edit Individual — Ministry Participation (Add)

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

ALCF Church Management System

Welcome, **Joe User**

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Sm
Child

to **Screen 2.2.1** | to **Screen 2.3.1** | to **Screen 2.5** | to **Screen 2.6** | to **Screen 2.9**

General Profile	Contact Info	Groups	Comments	Stewardship	Attributes

Ministry Participation

to **Screen 2.4.2**
Add New

Ministry	Role	Dates of Involvement

Add Ministry Participation for "John Smith"

Ministry: Worship Arts ▼   Refresh List   refreshes table below

Group Name	Type
Choir	Category
> Celebration Choir	Regular Group
> Gospel Choir	Regular Group
Easter Production 2009	Category
> Easter 2009 Cast	Regular Group
> Easter 2009 Costumes	Regular Group
> Easter 2009 Crew	Regular Group
Easter Production 2010	Category
> Easter 2010 Cast	Regular Group
> Easter 2010 Costumes	Regular Group
> Easter 2010 Crew	Regular Group
Worship Team	Regular Group

Cancel

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

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

ChMS Main IA.graffle
Thu Feb 04 2010
Page 23 of 55

ALCF

768 px

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

Edit Individual — Ministry Participation

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

ALCF Church Management System

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

to Screen 2.2.1 | to Screen 2.3.1 | | to Screen 2.5 | to Screen 2.6 | to Screen 2.9

General Profile	Contact Info	Groups	Comments	Stewardship	Attributes

John Sm
Head

Keri Bro
Spouse

Jack Sm
Child

Edit Ministry Participation for "John Smith" in "San Francisco 02"

Ministry Participation Status

Current Roles: Member
    Host

[Add a New Role]

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

Edit a Participation Period

Role: [Host ▼]

Membership Started: [Jul 23, 2009] [📅]

Membership Ended: [mm/dd/yyyy] [📅]

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

[Okay]

[**Update**] [Cancel]

768 px

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).

ALCF Church Management System

Welcome, **Joe User**

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** | to **Screen 2.3.1** | | to **Screen 2.5** | to **Screen 2.6** | to **Screen 2.9**

General Profile	Contact Info	Groups	Comments	Stewardship	Attributes

Ministry Participation

to **Screen 2.4.2**
Add New

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

to **Screen 2.4.4**
Add New

Subscribe Individual to a Communication List

Communication List: Super Fun Social Committee ▼

Subscribe   Cancel

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

768 px

+240 px

ALCF Church Management System

Welcome, **Joe User**

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	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 leaders

List of categories can be edited by the ChMS Administrator and will include categories like:
• Membership
• Ministry Involvement
• Benevolence
• Other

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

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

"Edit" is only available for comments that the user has actually entered — no one is able to edit a comment that they didn't enter. Clicking on "Edit" brings up a similar dialog box to that in **Screen 2.5.1**

Individual: John Smith

to **Screen 2.2.1** to **Screen 2.3.1** to **Screen 2.4.1** to **Screen 2.6** to **Screen 2.9**

General Profile	Contact Info	Groups	Comments	Stewardship	Attributes

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

Comments and Notes

to **Screen 2.5.1**
[Add New]

Filter by Posted By:
- View All -

Filter by Privacy Level:
- View All -

Filter by Category:
- View All -

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

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 comments.

A user can only edit his/her own comment.

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

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

ALCF Church Management System

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Individual: John Smith

to **Screen 2.2.1**   to **Screen 2.3.1**   to **Screen 2.4.1**   to **Screen 2.6**   to **Screen 2.9**

General Profile	Contact Info	Groups	Comments	Stewardship	Attributes

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

Comments and Notes

to **Screen 2.5.1**

Add New

Filter by Posted By: **Filter by Privacy Level:**   **Filter by Category:**

- All -

Add a Comment for John Smith

Privacy Level: [Staff ▼]

Category: [Benevolence ▼]

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

[Save]   [Cancel]

Curabitur nec elit at justo mollis

uspendisse potenti. Phasellus augue. haretra.

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

Praesent sem nisi, malesuada et, nsectetur a, nisl. Nunc ante nisl, cus ut, laoreet at, orci. Aenean eget assa congue egestas. Aenean eget assa.

Nulla iaculis, tortor non tristique

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

[Edit]	August McDermott	2009-03-16	Confidential	Membership

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

[Edit]	Wayne Bailey	2007-11-13	Confidential	Benevolence

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

[Edit]	Chuck Higgins	2009-07-04	Staff	Benevolence

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

[Edit]	Lilybell Parker	2009-10-20	General	Benevolence

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

[Edit]	Fran Donnelly	2009-11-30	Confidential	Other

768 px

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

View Change Log

ALCF Church Management System

Welcome, **Joe User**

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

View an Individual – Stewardship

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

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

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

Funds can be one of the following:
• Tithes/Offering
• Building Fund
• Specific to a Given Ministry
• Scholarship to a Given Event
• Support for a given individual or cause

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

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

Transaction Types can be one of the following:
• Cash
• Check (needs a check #)
• Credit Card (Online)
• Credit Card (Recurring)
• Corporate Match (Pre-Taxed)
• Corporate Match (Post-Taxed)
• Stock Donation
• Car/Automobile
• ?

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

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

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

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

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

Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

to **Screen 2.2.1** | to **Screen 2.3.1** | to **Screen 2.4.1** | to **Screen 2.5** | | to **Screen 2.9**

General Profile	Contact Info	Groups	Comments	Stewardship	Attributes

Stewardship

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

Print Report

to **Screen 2.6.1**
Add New

Date Range:
- View All -

Filter by Fund:
- View All -

Filter by Transaction Type:
- View All -

View Entire Household:
☑ View contributions by all household members

DATE v	Contributor	Fund	Transaction	Contributed	Cleared
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

768 px

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

View Change Log

Edit Individual – Stewardship

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

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

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

ALCF Church Management System

Welcome, **Joe User**

| PEOPLE | HOUSEHOLDS | GROUPS | COMMUNICATIONS | ADMINISTRATION | LOG OUT |

Individual: John Smith

to **Screen 2.2.1**	to **Screen 2.3.1**	to **Screen 2.4.1**	to **Screen 2.5**		to **Screen 2.9**
General Profile	Contact Info	Groups	Comments	Stewardship	Attributes

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

Stewardship

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

[Print Report]

to **Screen 2.6.1**

[Add New]

Date Range: **Filter by Fund:** **Filter by Transaction Type:** **View Entire Household:**

☑ View contributions by all household members

Add a New Stewardship Transaction

By: [John Smith ▼]

Fund: [Scholarship ▼]

[2010 Marriage Retreat ▼]

Transaction: [Check ▼] **Check #** [ ]

Amount: [$241.50]

Comment: [   ]

[Save] [Cancel]

		Contributed	Cleared
		$31.01	$25.00
	(Tax)	$333.89	$333.89
		$976.54	$976.54
		$995.02	$945.28
		$763.91	$763.91
	(Tax)	$409.72	$409.72
		$260.54	$260.54
		$994.58	$994.58
	(Tax)	$802.85	$802.85
		$307.21	$307.21
		$555.35	$555.35
		$268.17	$244.25
		$742.62	$742.62
	(Tax)	$778.54	$778.54
		$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

768 px

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

View Change Log

+240 px

Merge Individuals, Find

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

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

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

ALCF Church Management System

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Merge Individuals: "John Smith"

John Smith Household, 241 Main Street, Sunnyvale

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

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

Search / Filter List

First Name	Last Name	- View All Statuses - ▼	Refresh List	refreshes table below

Results: Viewing people 1-20 of 2141.   Previous | **Next**

First Name	LAST NAME v	Membership Status	Address	City
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

768 px

Merge Individuals, Reconcile Data

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

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

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

ALCF Church Management System

| **PEOPLE** | HOUSEHOLDS | GROUPS | COMMUNICATIONS | ADMINISTRATION | LOG OUT |

Merge Individuals: "John Smith"

Jonathan Smith
202 Long Drive, San Francisco

John Smith
202 Longg Street, San Francisco

Households

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

☐ 202 Longg Street, San Francisco
  with Karen Smith

Addresses

☑ Current Work
  2180 Salley Street, Mountain View

☐ Previous Work
  122 Main St, Palo Alto

☑ Previous Work
  122 Main Avenue, Palo Alto

Phone

☑ Mobile - (415) 555-1212

☐ Mobile - (415) 551-5121

☑ Work - (415) 555-1234

Membership, Family, Biographical

○ Married
◉ Birthday: Feb 11, 1977
◉ Member since July 2, 2008

◉ Married to Karen Smith since 1/21/2004
○ Birthday: Feb 11
○ Non-Member

[Merge]   [Cancel]

Edit Individual, Join a Household

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

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

ALCF Church Management System

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Join a Household: "John Smith"

Home Address

Address 1: 425 Western Ave.

Address 2:

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

Primary Home Phone: 650-555-1212

Alternate Home Phone: 650-824-1241

Alternate Home Phone: 650-555-1234

Add Another

Next   Cancel

Edit Individual, Join a Household, Ensure Unique

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

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

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

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

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

ALCF Church Management System

Welcome, **Joe User**

| PEOPLE | HOUSEHOLDS | GROUPS | COMMUNICATIONS | ADMINISTRATION | LOG OUT |

Join a Household: "John Smith"

425 Western Ave., Sunnyvale, CA 94048

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

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

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

HOUSEHOLD NAME ∨	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

[None Found – Create as a New Household]   [Back]   [Cancel]

View an Individual – Attributes

Attributes are any other fields that ministries or other users may want to track for an individual, including things like:
• Date Accepted Christ
• Date of Baptism
• Spiritual Gifts
• Vocational Gifts
• Baptized at ALCF?
• Previous Church Membership
etc.

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

Attribute "Types" include:
• Date
• Date w/ Year Optional
• Strict Dropdown (Single-Select)
• Flexible Dropdown (Single-Select)
• Strict Dropdown (Multiple-Select)
• Flexible Dropdown (Multiple-Select)
• Text
• Checkbox (e.g. a aimple "Yes" or "No")

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

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

ALCF Church Management System

Welcome, **Joe User**

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Individual: John Smith

to **Screen 2.2.1**   to **Screen 2.3.1**   to **Screen 2.4.1**   to **Screen 2.5**   to **Screen 2.6**

General Profile	Contact Info	Groups	Comments	Stewardship	**Attributes**

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

Attributes

to **Screen 2.9.2**
[Add a New Attribute]

Date Accepted Christ: January 1997
[Edit]

Spiritual Gifts: Healing, Prayer
[Edit]

Ministry Consultation Guide: Chris Warren
[Edit]

Ministry Consultation Date: February 5, 2005
[Edit]

768 px

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

View an Individual – Edit Attributes

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

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

ALCF Church Management System

Welcome, **Joe User**

| PEOPLE | HOUSEHOLDS | GROUPS | COMMUNICATIONS | ADMINISTRATION | LOG OUT |

Individual: John Smith

to **Screen 2.2.1**   to **Screen 2.3.1**   to **Screen 2.4.1**   to **Screen 2.5**   to **Screen 2.6**

| General Profile | Contact Info | Groups | Comments | Stewardship | Attributes |

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

Attributes

to **Screen 2.9.2**
Add a New Attribute

Edit "Ministry Consultation Date"

Ministry Consultation Date: `2/5/2005` [calendar]

Save   Cancel

Mini

Ministry Consultation Date: February 5, 2005
Edit

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

768 px

+240 px

View an Individual – Add an Attribute

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

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

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

ALCF Church Management System

Welcome, **Joe User**

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Individual: John Smith

to **Screen 2.2.1**   to **Screen 2.3.1**   to **Screen 2.4.1**   to **Screen 2.5**   to **Screen 2.6**

General Profile	Contact Info	Groups	Comments	Stewardship	Attributes

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

Attributes

to **Screen 2.9.2**
Add a New Attribute

Add an Attribute to John Smith

Select Attribute: Date of Baptism ▼

Select   Cancel

Mini

Ministry Consultation Date: February 5, 2005
Edit

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

View Change Log

Search for a Household

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

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

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

Households must have at least one individual in it.

Individuals may be part of multiple households.

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

ALCF Church Management System

| PEOPLE | HOUSEHOLDS | GROUPS | COMMUNICATIONS | ADMINISTRATION | LOG OUT |

Search for a Household

Search / Filter List

| Name | Address | - View All Cities - ▼ | Refresh List | refreshes table below |

Results: Viewing households 1-20 of 2141.   Previous | **Next**

HOUSEHOLD NAME ∨	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

View Household

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

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

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

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

ALCF Church Management System

Welcome, **Joe User**

| PEOPLE | HOUSEHOLDS | GROUPS | COMMUNICATIONS | ADMINISTRATION | LOG OUT |

Household: John Smith Household

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

Household Members

to **Screen 3.3**
[Edit Roles]

Role	Name	Email	Phone
Head	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 John 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**
[Combine Households]

ChMS Main IA.graffle
Thu Feb 04 2010
Page 38 of 55

ALCF

768 px

+240 px

Edit Household – Roles

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

ALCF Church Management System

Welcome, **Joe User**

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Household: John Smith Household

Household Members

to **Screen 3.3**
Edit Roles

Role	Name	Email	Phone
Head	Joh		
Spouse	Ke		
Child	Ja		

Edit Head of Household

Head of Household: John Smith ▼

Save   Cancel

Home Address a

3.4

Current	Ad			
Current Home	42			
[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**
Combine Households

768 px

Edit Household – Address and Phone

The interactions here match the interactions from
Screen 2.3.2.

ALCF Church Management System

Welcome, **Joe User**

| PEOPLE | HOUSEHOLDS | GROUPS | COMMUNICATIONS | ADMINISTRATION | LOG OUT |

Household: John Smith Household

Household I

Role
Head
Spouse
Child

Home Addre

Current
Current Home
[set as current]
[set as current]

Edit Household – Home Address and Phone

Home Address

Current/Previous: [Current Home Address ▼]

Address 1: 425 Western Ave.

Address 2: [ ]

City, State, Postal Code: [City] [- State - ▼] [Postal Code]

Primary?

Primary Home Phone: 650-555-1212   ◉

Alternate Home Phone: 650-824-1241   ○

Alternate Home Phone: 650-555-1234   ○

Add Another

Update   Cancel

to **Screen 3.5**
Add an Individual

to **Screen 3.6**
Remove an Individual

to **Screen 3.7**
Split this Household

to **Screen 3.8**
Combine Households

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**)

ALCF Church Management System

| PEOPLE | HOUSEHOLDS | GROUPS | COMMUNICATIONS | ADMINISTRATION | LOG OUT |

Household: John Smith Household

Household

Role
Head
Spouse
Child

Home Addre

Current
Current Home
[set as current]
[set as current]

Edit Household – Add Individual

Role in Household

Head of Household? [No ▼]

Name Information

Title: [- None - ▼]

First Name: [Patrick]

Middle Name or Initial: [ ]

Last Name: [Smith]

Suffix: [- None - ▼]

Goes By: [ ]

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

Biographical Information

Date of Birth: [mm/dd/yyyy] [📅]

Gender: [Male ▼]

[Next] [Cancel]

[Add an Individual] [Remove an Individual] [Split this Household] [Combine Households]

768 px

ChMS Main IA.graffle
Thu Feb 04 2010
Page 41 of 55

ALCF

+240 px

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**.

ALCF Church Management System

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Household: John Smith Household

Household M...

Role		
Head		
Spouse		
Child		

Edit Household – Add Individual

Matched Individuals

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

Back   Create **Patrick Smith** as a New Individual   Cancel

Home Address and Phone for the John Smith Household

to **Screen 3.4**
Add New

Current	Address	City/State	Zip Code	Home Phone
Current Home	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**
Combine Households

ChMS Main IA.graffle
Thu Feb 04 2010
Page 42 of 55

ALCF

768 px

+240 px

Edit Household – Remove an Individual

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

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

ALCF Church Management System

| PEOPLE | HOUSEHOLDS | GROUPS | COMMUNICATIONS | ADMINISTRATION | LOG OUT |

Household: John Smith Household

Household Members

to **Screen 3.3**
Edit Roles

Role	Name	Email	Phone
Head	Joh		
Spouse	Ke		
Child	Jac		

Home Address a

Current	Ad				
Current Home	42				
[set as current]	123 Main Street, Apt. #3	Palo Alto, CA	94011	650-555-1212
[set as current]	1852 Mary Ave	Sunnyvale, CA	94087	408-421-1725

Remove an Individual

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

Individual to Remove: Jack Smith ▼

Remove   Cancel

to **Screen 3.5**
Add an Individual

to **Screen 3.6**
Remove an Individual

to **Screen 3.7**
Split this Household

to **Screen 3.8**
Combine Households

Edit Household – Split Households

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

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

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

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

Current home address information for this household will remain unchanged.

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

ALCF Church Management System

Welcome, **Joe User**

| PEOPLE | HOUSEHOLDS | GROUPS | COMMUNICATIONS | ADMINISTRATION | LOG OUT |

Household: John Smith Household

Household Mem

Role	N
Head	J
Spouse	K
Child	Ja

Home Address

Current	A
Current Home	4
[set as current]	1
[set as current]	1

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**
Combine Households

Edit Household – Combine Households

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

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

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

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

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

ALCF Church Management System

Welcome, **Joe User**

| PEOPLE | HOUSEHOLDS | GROUPS | COMMUNICATIONS | ADMINISTRATION | LOG OUT |

Household: John Smith Household

Household

Role
Head
Spouse
Child

Home A...

Current
Current Hom...
[set as curre...
[set as curre...

Combine Households

Search for a Household to Combine

Name: Carl Smith

Address: 425 Western Ave.

	Household Name	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

Head of Combined Household: John Smith ▾

[Combine] [Cancel]

768 px

+240 px

View Groups – Example for Worship Arts

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

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

Groups can have an email alias (e.g. realworld@groups.alcf.net) as well as one or more individuals (e.g. staff member, lay leader, etc.) who moderates and manages the email alias. Email options for each group can be one of the following:
* **Announce Only** – only moderators and users affiliated with this ministry is allowed to send messages to this list
* **Private List** – only members of the group can send messages to the list
* **Public List** – anyone can send messages to the list

These are the following "Types" of groups:
* **Ad Hoc** – these are self-service groups that need to be further-defined.
* **Category** – see below for more information
* **Growth** – these are Growth Groups, which has a host, a facilitator, and a structure type (e.g. Young Adult, Regular, Spanish Speaking, etc.)
* **Regular** – these groups are for everything else
* **Smart** – these groups cannot have individuals manually added or removed to it, but instead its membership is defined by rules (e.g. "any individual who is listed as a facilitator of a Growth Group")

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

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

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

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

ALCF Church Management System

Welcome, **Joe User**

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

View Groups in "Worship Arts"

Ministry: [Worship Arts ▼]   [Refresh List]   refreshes table below

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

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

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

Create a New Group for Type: [Regular Group ▼]   [Create]

[View Roles in **Worship Arts**]
to **Screen 4.5**

ALCF Church Management System

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

View Groups in "Growth Groups"

Ministry: [Growth Groups ▼]   [Refresh List]   refreshes table below

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

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

Create a New Group for Type: [Regular Group ▼]   [Create]

[View Roles in **Worship Arts**]

to **Screen 4.5**

View Group – type "Category"

Groups must be affiliated with at least one ministry.

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

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

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

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

ALCF Church Management System

Welcome, **Joe User**

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Group Category "Growth Groups"

CONFIDENTIAL

only displayed if group is "Confidential"

Ministry:	Growth Groups
Parent Category:	*none*
Email List Preferences:	Announce Only – gg@groups.alcf.net

to **Screen 4.3.1**

[Edit]

Groups in this Category

Group Name	Type	Email
Peninsula	Category	*none*
> San Francisco 01	Regular Group	Private List – gg.sf01@groups.alcf.net
> San Francisco 02	Regular Group	Private List – gg.sf02@groups.alcf.net
South Bay	Category	*none*
> Mountain View 01	Regular Group	Private List – gg.mv01@groups.alcf.net
> Palo Alto 01	Regular Group	Private List – gg.pa01@groups.alcf.net

Individuals in the Groups in this Category

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

View Group – type "Growth"

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

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

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

ALCF Church Management System

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Growth Group "San Francisco 02"

to **Screen 4.3.1**

[Edit]

Ministry:	Growth Groups
Parent Category:	Growth Groups > Peninsula
Email List Preferences:	Private List – gg.sf02@groups.alcf.net

to **Screen 4.4.2**

Individuals in this Group

[Add a Member]

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

Edit Group

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

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

ALCF Church Management System

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Group Category "Growth Groups"

CONFIDENTIAL

only displayed if group is "Confidential"

Ministry:	Growth Groups
Parent Category:	*none*
Email List Preferences:	Announce Only – gg@groups.alcf.net

to **Screen 4.3.1**

Edit

Groups in this Categ...

Group Name
Peninsula
> San Francisco 01
> San Francisco 02
South Bay
> Mountain View 01
> Palo Alto 01

Individuals in the Gr...

First Name
Addis
Marshal
Clem
Cleo
Pansy
Robbie
Rona
Mildred

Edit Category Group

General Information

Name: Growth Groups

Parent Category: - None -

Confidential?: ☐ Check if Confidential

Ministry:

Growth Groups
Family
Safari Kids
Student Ministries
Worship Arts

Email List Preferences

Email List Type: Announcement Only

Name: gg

Update   Cancel

---

					r and Member
					d Member
					r and Member
Etheldreda	Brooks	ebrooks2987@excite.com	N	San Francisco 02	Member
Benjamin	Browne	benjamin.browne6107@hotmail.com	Y	San Francisco 01	Faciliator
Jared	Bryant	jbryant2426@gmail.com	N	Palo Alto 01	Faciliator
Travers	Burke	tburke2474@gmail.com	N	San Francisco 02	Member
Connie	Burns	cburns8466@rice.edu	Y	Palo Alto 01	Faciliator
Bobby	Carter	bobbyc1537@rice.edu	N	Mountain View 01	Faciliator
Ginnie	Carter	gcarter6314@earthlink.net	N	San Francisco 02 and Mountain View 01	Member
Nessia	Clarke	nessiac5553@rice.edu	N	Mountain View 01	Member
Rowena	Coleman	rcoleman8763@rice.edu	N	Mountain View 01	Host
Juliet	Cox	juliet.cox3115@gmail.com	Y	San Francisco 02 and Mountain View 01	Faciliator
Stanford	Cox	stanford.cox7017@aol.com	N	Mountain View 01	Member
Doug	Daly	dougd7928@rocketmail.com	N	Palo Alto 01	Member

768 px

+240 px

Edit Group Membership

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

ALCF Church Management System

Welcome, **Joe User**

| PEOPLE | HOUSEHOLDS | GROUPS | COMMUNICATIONS | ADMINISTRATION | LOG OUT |

Growth Group "San Francisco 02"

to **Screen 4.3.1**
[Edit]

Ministry: Growth Groups

Email L

to **Screen 4.4.2**
[d a Member]

Individuals i

Edit	Firs
Edit	Abie
Edit	Alas
Edit	Alfre
Edit	Alida
Edit	Alva
Edit	Alvin
Edit	Ame
Edit	And
Edit	And
Edit	Anita
Edit	Arde
Edit	Arria

Edit Ministry Participation for "John Smith" in "San Francisco 02"

Ministry Participation Status

Current Roles: Member
Host

[Add a New Role]

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

Edit a Participation Period

Role: Host ▼

Membership Started: Jul 23, 2009 [📅]

Membership Ended: mm/dd/yyyy [📅]

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

[Okay]

[**Update**] [Cancel]

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

768 px

ChMS Main IA.graffle
Thu Feb 04 2010
Page 51 of 55

ALCF

+240 px

Add Group Membership

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

List of Roles is defined at the Ministry level.

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

ALCF Church Management System

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Growth Group "San Francisco 02"

to **Screen 4.3.1**
Edit

Ministry:

Parent Category:

Email List Preferences:

to **Screen 4.4.2**
Add a Member

Individuals in this Group

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

Add a Ministry Participant to "San Francisco 02"

Role in Group

Role: Faciliator ▼

Participation Started: Jul 23, 2009 📅

Participation Ended: mm/dd/yyyy 📅

Name Information

Title: - None - ▼

First Name: Jennifer

Middle Name or Initial:

Last Name: Peterson

Suffix: - None - ▼

Goes By: Jenny Peterson

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

Contact Information

Email: jpeterson@gmail.com

Phone: 408-555-1212

Cell Phone ▼

Next   Cancel

Kane   bobyk4623@hotmail.com   N   Member

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

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

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

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

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

ALCF Church Management System

Welcome, **Joe User**

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Growth Group "San Francisco 02"

Edit

Ministry:
Parent Category:
Email List Preferences:

Add a Member

Individuals in this Group

Add New Member to "San Francisco 02"

Matched Individuals

Select	First Name	Last Name	Address	Email
Select	Jennifer	Peterson	425 Western Ave	*none*
Select	Jen	Peterson-Smith	285 Maple Drive, Apt. #3	jps@hotmail.com
Select	Jenny	Pattyson	1802 Pasqualito Drive	*none*

Back   Create **Jenny Peterson** as a New Individual   Cancel

Edit	First Name				
Edit	Abie				
Edit	Alastair				
Edit	Alfred				
Edit	Alida				
Edit	Alva	Wright	alvaw1204@rocketmail.com	Y	Member
Edit	Alvina	Peterson	alvina.peterson3107@gmail.com	Y	Member
Edit	Amery	Cullen	amery.cullen9880@mail.nasa.gov	Y	Member
Edit	Andrew	Burke	andrew.burke9075@sbcyahoo.com	Y	Member and Faciliator
Edit	Andy	O'Leary	aoleary9121@sbcyahoo.com	Y	Member and Faciliator
Edit	Anita	Scott	anitas6858@rocketmail.com	Y	Member and Faciliator
Edit	Ardelle	McMahon	ardelle.mcmahon3962@lycos.com	N	Member
Edit	Arrian	White	awhite7173@aol.com	Y	Member
Edit	Artie	White	awhite87@hotmail.com	N	Member
Edit	Babs	Johnson	bjohnson989@earthlink.net	N	Member
Edit	Baldwin	Flores	bflores2329@earthlink.net	Y	Member
Edit	Bass	Doyle	bass.doyle7418@sbcglobal.net	N	Member and Host
Edit	Baxter	Hwang	baxterh1607@aol.com	N	Member
Edit	Betsy	Ross	betsyr1042@excite.com	Y	Member
Edit	Beverley	Evans	beverley.evans2383@attmail.com	Y	Member
Edit	Birdie	Graham	birdieg134@excite.com	Y	Member
Edit	Boby	Kane	bobyk4623@hotmail.com	N	Member

View Group Roles for Ministry

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

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

Each defined role must have a role type:
• Volunteer
• Participant

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

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

ALCF Church Management System

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

View Roles in "Worship Arts"

Edit / Delete	Role
Edit | Delete	Actor (Volunteer)
Edit | Delete	Leader (Volunteer)
Edit | Delete	Musician (Volunteer)
Edit | Delete	Participant (Participant)
Edit | Delete	Singer (Volunteer)

Role Name: [   ]

Role Type: [- Select One -   ▼]

[Add Role]

updates the above list and saves changes

[Back to View Groups]

to **Screen 4.1.1**

Main Administration Menu

Only ChMS Administrators have access to this page and anything else under "Administration".

ALCF Church Management System

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Administration Menu

[Vew Users]   View and Manage Users of the ChMS System

goes to **Screen 6.2**

768 px