

Login Page

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

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

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**

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

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

ALCF Church Management System

Welcome, Joe User

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT
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Main Menu

Quick Search: People

First Name:

Last Name:

Search for Person

goes to **Screen 2.1**

Quick Search: Groups

Name:

Search for Group

goes to **Screen 4.1**

People

Manage individual membership records

goes to **Screen 2.1**

Households

Manage household records

goes to **Screen 3.1**

Groups

Manage group records

goes to **Screen 4.1.1**

Communications

Manage communication lists

goes to **Screen 5.1**

Administration

Manage administration tasks for the ALCF ChMS

goes to **Screen 6.1**

Search for an Individual

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

Each individual can be a membership status of type:

- Member
- Child of Member
- Former Member
- None

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

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

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

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

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

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

PEOPLE

HOUSEHOLDS

GROUPS

COMMUNICATIONS

ADMINISTRATION

LOG OUT

Search for an Individual

Search / Filter List

- View All Statuses -

Refresh List

refreshes table below

Results: Viewing people 1-20 of 2141.

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

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

View an Individual – General Profile Tab
Single Household

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

Depending on the type of individual, the screen the
individual would show up on would be on one of the
following wireframes:
• Individual that is part of a 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 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.

Households with at least one adult must have one
and only one adult 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
that household would not have a "head of
household". This would be changed once the
parent information is entered.

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

There can only be one Head of Household.

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

Only users with the CanMergeIndividuals
permission can view or click on the **Merge Records**
button. Button will take the user to **Screen 2.7**.

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

John Smith Household
425 Western Ave, Sunnyvale

John Smith

Head

Keri Brown

Wife

Jack Smith

Son

Merge Records

to Screen 2.7

General Profile

to Screen 2.3.1

Contact Information

to Screen 2.4.1

Groups

to Screen 2.5

Comments

to Screen 2.6

Stewardship

to Screen 2.9

Attributes

Edit

to Screen 2.2.3

Full Name:

Dr. Jonathan Mark Smith, III

Goes By:

John Smith

Date of Birth:

March 1, 1977 (32 years old)

Gender:

Male

Deceased:

Yes

Edit

to Screen 2.2.4

Membership Status:

Member, since June 22, 2006 (3 years)

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

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

Edit

to Screen 2.2.5

Family Information:

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

Sister: Joanna Smith-Stevens

Son: Jack Smith

Mother: Percilla Smith

Father: Don Smith

Household:

Head of the John Smith Household

to Screen 3.2

Details

to Screen 2.3.1

Primary Contact Info:

425 Western Avenue
Sunnyvale, CA 94086

408-555-1212
jsmith@gmail.com

Record last updated on February 23, 2009 by Doris Cohen

[View Change Log](#)

ChMS Main IA.graffle
Thu Jan 21 2010
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ALCF
The Lutheran Church of America

768 px

+240 px

View an Individual – General Profile Tab
Single-Person Household

See [Screen 2.2](#) for notes.

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

Individual: John Smith

John Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

[General Profile](#)[to Screen 2.3.1](#)[Contact Information](#)[to Screen 2.4.1](#)[Groups](#)[to Screen 2.5](#)[Comments](#)[to Screen 2.6](#)[Stewardship](#)[to Screen 2.9](#)[Attributes](#)

[Edit](#)
to Screen 2.2.3

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

[Edit](#)
to Screen 2.2.4

Membership Status: Member, since June 22, 2006 (3 years)
Prior membership from January 15, 2002 - March 28, 2003
Prior membership from April 12, 1996 - November 4, 1999

[Edit](#)
to Screen 2.2.5

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: 425 Western Avenue
Sunnyvale, CA 94086

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](#)



[Edit](#)
to Screen 2.2.5

ChMS Main IA.graffle
Thu Jan 21 2010
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Following the vision of Jesus Christ

768 px

+240 px

View an Individual – General Profile Tab
No Household on File

See **Screen 2.2** for notes.

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

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

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

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

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

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

Individual: John Smith

No Household on File
[Create One](#) to Screen 2.8

John Smith

General Profile

to Screen 2.3.1.1

Contact Information

to Screen 2.4.1

Groups

to Screen 2.5

Comments

Edit

to Screen 2.2.3

Full Name:

Dr. Jonathan Mark Smith, III

Goes By:

John Smith

Date of Birth:

March 1, 1977 (32 years old)

Gender:

Male

Membership Status:

Non-Member

Edit

to Screen 2.2.5

Family Information:

Single
Sister: [Joanna Smith-Stevens](#)
Son: [Jack Smith](#)
Mother: [Percilla Smith](#)
Father: [Don Smith](#)

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](#)

Merge Records

to Screen 2.7

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

[View Change Log](#)



Edit
to Screen 2.2.5

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

General Profile

to Screen 2.3.1

Contact Information

to Screen 2.4.1

Groups

to Screen 2.5

Comments

to Screen 2.6

Stewardship

to Screen 2.9

Attributes

Edit

to Screen 2.2.3

Full Name: Jonathan Mark Smith, Jr.

Goes By: John Smith

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

Gender: Male

Edit

to Screen 2.2.4

Membership Status: Child of Member

Edit

to Screen 2.2.5

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

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

Details

to Screen 2.3.1

Primary Contact Info: 425 Western Avenue
Sunnyvale, CA 94086

408-555-1212
jsmith@gmail.com

Merge Records

to Screen 2.7

Rick Adams Household
123 Main Street, Palo Alto

Amber Westfield Household
1852 Mary Ave, Sunnyvale

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

[View Change Log](#)



Edit

to Screen 2.2.6

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.

PEOPLEHOUSEHOLDSGROUPSCOMMUNICATIONSADMINISTRATIONLOG OUT

Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

General Profile

Contact Information

Groups

Comments

Stewardship

to Screen 2.3.1

to Screen 2.4.1

to Screen 2.5

to Screen 2.6

Title:

Dr.

First Name:

Jonathan

Middle Name or Initial:

Mark

Last Name:

Smith

Suffix:

III

Nickname:

Johnny

Mailing Label:

Johnny Smith

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

Date of Birth:

March 2

Gender:

Male

Deceased:

No

Update

Cancel

Biographical Information

Date of Birth:

March 2

Gender:

Male

Deceased:

No

Update

Cancel

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

Edit

to Screen 2.2.5

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

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

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

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

ChMS Main IA.graffle
Thu Jan 21 2010
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A Living Fellowship of Jesus Christ

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**

PEOPLEHOUSEHOLDSGROUPSCOMMUNICATIONSADMINISTRATIONLOG OUT

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Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

General Profile

to Screen 2.3.1
Contact Information

to Screen 2.4.1
Groups

to Screen 2.5
Comments

to Screen 2.6
Stewardship

Edit
to Screen 2.2.3


Full Name: Dr. Jonathan Mark Smith, III

Goes By: John Smith

Member Status: Member

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

Gender: Male



Edit
to Screen 2.2.5

Membership Status

Current Status: Member

Add a Membership Period

Close

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

Record last updated on February 23, 2009 by Doris Cohen

[View Change Log](#)

Edit an Individual – Membership Dates

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

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

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

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

PEOPLEHOUSEHOLDSGROUPSCOMMUNICATIONSADMINISTRATIONLOG OUT

Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

General Profile

Contact Information

Groups

Comments

Stewardship

Edit
to Screen 2.2.3

Full Name: Dr. Jonathan Mark Smith, III

Goes By: John Smith

Member Status: Member

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

Gender: Male

to Screen 2.3.1

to Screen 2.4.1

to Screen 2.5

to Screen 2.6

to Screen 2.2.5

Edit Membership Information

Edit a Prior Membership

Membership Started: mm/dd/yyyy

Membership Ended: mm/dd/yyyy

Update

Cancel

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

+240 px

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.

Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith

Head

Keri Brown

Spouse

Jack Smith

Child

General Profile

to **Screen 2.3.1**

Contact Information

to **Screen 2.4.1**

Groups

to **Screen 2.5**

Comments

to **Screen 2.6**

Stewardship

Edit

to **Screen 2.2.3**

Full Name: Dr. Jonathan Mark Smith, III

Goes By: John Smith

Member Status: Member

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

Gender: Male

Edit Individual's Photograph

Select an Image:



Upload New Image:

Browse...

Update

Cancel

Edit

to **Screen 2.2.5**

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

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

View Change Log

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)
- 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**.

Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

to Screen 2.2.1

General Profile

Contact Info

to Screen 2.4.1

Groups

to Screen 2.5

Comments

to Screen 2.6

Stewardship

to Screen 2.9

Attributes

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

to Screen 2.3.3

Add New

Other Addresses for John Smith

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

to Screen 2.3.4

Add New

Phone Numbers for John Smith

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

to Screen 2.3.5

Add New

Email Addresses

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

to Screen 2.3.6

Add New

Other Contact Information for John Smith

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

View an Individual – Contact Information Tab
No Household

See **Screen 2.3.1** for more information.

This screen is used for individuals who have NO
household. They cannot have any addresses
defined.

They CAN, however, have a Home phone defined.

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT
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Individual: John Smith

No Household
[Create One](#)

to Screen 2.8

John Smith
Individual

to Screen 2.2.1.1

General Profile

Contact Info

to Screen 2.4.1

Groups

to Screen 2.5

Comments

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

Other Contact Information for John Smith

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

Edit an Individual – Household Address and
Phone

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

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

Options are:
• Current Home Address
• Previous Home Address

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

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

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

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

ALCF Church Management System

Welcome, Joe User

PEOPLE

HOUSEHOLDS

GROUPS

COMMUNICATIONS

ADMINISTRATION

LOG OUT

Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

to Screen 2.2.1

General Profile

Contact Info

to Screen 2.4.1

Groups

to Screen 2.5

Comments

to Screen 2.6

Stewardship

to Screen 2.9

Attributes

Home Address and Phone for the Smith Household

to Screen 2.3.2

Add New

Current	Address	City/State	Zip Code	Home Phone
Current Home	425 Western Ave	Sunnyvale, CA	94086	408-555-1212
Previous Home	123 Main Street, Apt. #2	Palo Alto, CA	94011	650-555-1212
Previous Home	456 Elm Street	San Jose, CA	95128	408-555-1725

to Screen 2.3.3

Add New

to Screen 2.3.5

Add New

to Screen 2.3.6

Add New

Edit Household – Home Address and Phone

Home Address

Current/Previous: Current Home Address

Address 1: 425 Western Ave.

Address 2:

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

Primary?

Primary Home Phone: 650-555-1212

Alternate Home Phone: 650-824-1241

Alternate Home Phone: 650-555-1234

Add Another

Delete

Update

Cancel

Other Contact Information for John Smith

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

ALCF Church Management System

Welcome, Joe User

PEOPLEHOUSEHOLDSGROUPSCOMMUNICATIONSADMINISTRATIONLOG OUT

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

Other Addresses for John Smith

to Screen 2.3.3

Add New

to Screen 2.3.5

Add New

Address

smith@gmail.com

1231@yahoo.com

john.f.smith@company.org

to Screen 2.3.6

Add New

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

Other Contact Information for John Smith

to Screen 2.3.6

Add New

Address Information

Address Type: Current Work

Address 1: 2810 Coleman Avenue

Address 2:

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

Delete

Update

Cancel

ChMS Main IA.graffle

Thu Jan 21 2010

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ALCF

768 px

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

+240 px

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**.

PEOPLEHOUSEHOLDSGROUPSCOMMUNICATIONSADMINISTRATIONLOG OUT

Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

General Profile

Contact Info

Groups

Comments

Stewardship

Attributes

Home Address and Phone for the Smith Household

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

Other Addresses for John Smith

Current	Address	City/State	Zip Code	Home Phone
[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	

Other Contact Information for John Smith

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

to Screen 2.2.1

to Screen 2.4.1

to Screen 2.5

to Screen 2.6

to Screen 2.9

to Screen 2.3.2

to Screen 2.3.3

to Screen 2.3.5

to Screen 2.3.6

Phone Information


Phone Type: Work

Primary? No

Phone Number: 408-555-2123

DeleteUpdateCancel

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Thu Jan 21 2010
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768 px

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

+240 px

Edit an Individual – Email

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

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

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**.

PEOPLE

HOUSEHOLDS

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LOG OUT

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Individual: John Smith

to Screen 2.2.1

General Profile

Contact Info

to Screen 2.4.1

Groups

to Screen 2.5

Comments

to Screen 2.6

Stewardship

to Screen 2.9

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
[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

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

Other Contact Information for John Smith

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

Edit Email Address

Email Information

Primary? No

Email Address: john.smith@gmail.com

Delete

Update

Cancel

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

Edit an Individual – Other Contact

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

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

The list of Contact Info Types is managed/editable by the Admin in the Administration section, Screen 2.2.1.

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

PEOPLE

HOUSEHOLDS

GROUPS

COMMUNICATIONS

ADMINISTRATION

LOG OUT

Individual: John Smith

to Screen 2.2.1

General Profile

Contact Info

to Screen 2.4.1

Groups

to Screen 2.5

Comments

to Screen 2.6

Stewardship

to Screen 2.9

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

Other Addresses for John Smith

to Screen 2.3.3

Add New

Address	Phone
[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

Other Contact Information for John Smith

to Screen 2.3.5

Add New

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

to Screen 2.3.6

Add New

Other Contact Information

Contact Info Type: Twitter ID

Value: john_smith_417

Delete


Update

Cancel

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768 px

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

+240 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**.

PEOPLE

HOUSEHOLDS

GROUPS

COMMUNICATIONS

ADMINISTRATION

LOG OUT

Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

to Screen 2.2.1

General Profile

to Screen 2.3.1

Contact Info

Groups

to Screen 2.5

Comments

to Screen 2.6

Stewardship

to Screen 2.9

Attributes

to Screen 2.4.2

Add New

Ministry Participation

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

Communication Lists

to Screen 2.4.4

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

Edit Individual — Ministry Participation (Add)

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

Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Sm
Child

to Screen 2.2.1

General Profile

to Screen 2.3.1

Contact Info

Groups

to Screen 2.5

Comments

to Screen 2.6

Stewardship

to Screen 2.9

Attributes

Ministry Participation

to Screen 2.4.2

Add New

Ministry

Role

Dates of Involvement

Add Group Membership for "John Smith"

Ministry: Worship Arts

Refresh List

refreshes table below

Group Name

Type

Choir

Category

> Celebration Choir

Regular Group

> Gospel Choir

Regular Group

Easter Production 2009

Category

> Easter 2009 Cast

Regular Group

> Easter 2009 Costumes

Regular Group

> Easter 2009 Crew

Regular Group

Easter Production 2010

Category

> Easter 2010 Cast

Regular Group

> Easter 2010 Costumes

Regular Group

> Easter 2010 Crew

Regular Group

Worship Team

Regular Group

Cancel

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

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

Edit Individual — Ministry Participation

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

PEOPLEHOUSEHOLDSGROUPSCOMMUNICATIONSADMINISTRATIONLOG OUT

Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

to Screen 2.2.1
General Profile

to Screen 2.3.1
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Stewardship

to Screen 2.9
Attributes

to Screen 2.4.2
Add New

Membership Status

Current Roles:

Member

Host

Add a New Role

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

Edit a Membership Period

Role:

Host

Membership Started:

Jul 23, 2009

Membership Ended:

mm/dd/yyyy


Okay

Update

Cancel

This "Edit a Membership 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 Membership Start Date are required. Membership End Date is optional.

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ALCF

Following the vision of Jesus Christ

768 px

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

+240 px

Edit Individual — Communication List

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

Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

to Screen 2.2.1

General Profile

to Screen 2.3.1

Contact Info

Groups

to Screen 2.5

Comments

to Screen 2.6

Stewardship

to Screen 2.9

Attributes

Ministry Participation

to Screen 2.4.2

Add New

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

Subscribe Individual to a Communication List

Communication List: Super Fun Social Committee ▼

Subscribe

Cancel

to Screen 2.4.4

Add New

View an Individual – Comments

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

There are three levels of comment privacy:

- Confidential – can only be viewed by pastors and executive staff members
- Staff Comments – can be viewed by any ALCF staff member
- General Comments – can be viewed by anyone with access to the ChMS, including lay ministry leaders

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

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

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

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

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT
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Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

to Screen 2.2.1 General Profile	to Screen 2.3.1 Contact Info	to Screen 2.4.1 Groups	Comments	to Screen 2.6 Stewardship	to Screen 2.9 Attributes
------------------------------------	---------------------------------	---------------------------	----------	------------------------------	-----------------------------

Comments and Notes

to Screen 2.5.1
Add New

Filter by Posted By:

- View All -

Filter by Comment Type:

- View All -

Filter by Hidden State:

☒ Include Hidden Comments

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

Edit an Individual – Comments

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

A user can only edit his/her own comment.

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

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

PEOPLEHOUSEHOLDSGROUPSCOMMUNICATIONSADMINISTRATIONLOG OUT

Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

General Profile

Contact Info

Groups

Comments

Stewardship

Attributes

to Screen 2.2.1

to Screen 2.3.1

to Screen 2.4.1

to Screen 2.6

to Screen 2.9

to Screen 2.5.1
Add New

Filter by Posted By:

Filter by Comment Type:

Filter by Hidden State:

Add a Comment for John Smith

Comment Type: Staff

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

SaveCancel

[Hide]

Connie Jenkins

2005-09-07

Confidential

Nam id enim. Suspendisse condimentum. Praesent in ipsum eu massa tempus euismod. Mauris pulvinar. Suspendisse potenti. Sed sollicitudin, quam ut pulvinar posuere, ipsum.

[Unhide]

Ilana Doyle

2007-03-04

Confidential

Ut et risus quis justo iaculis vestibulum. Ut sapien eros, gravida nec, placerat et, luctus eu, libero. Mauris.

[Hide]

Aspasia Power

2007-03-11

Staff

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

[Unhide]

Tavy Smith

2008-08-03

General

In porta rhoncus libero. Mauris tristique lacinia tellus. Maecenas egestas, mauris sit amet suscipit pretium, massa lacus facilisis eros, eu sodales dui eros eu nisl. Curabitur quis metus. Mauris lectus. Quisque erat nunc.

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

View an Individual – Stewardship

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

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

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

Funds can be one of the following:

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

List of specific ministries, events, and individuals or causes can be edited by anyone in the Stewardship committee in the Administration section. See **Screen 2.2** for more information.

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

- Imagine Campaign
- ?

Transaction Types can be one of the following:

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

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

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

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

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

Questions:

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

PEOPLE

HOUSEHOLDS

GROUPS

COMMUNICATIONS

ADMINISTRATION

LOG OUT

Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

to Screen 2.2.1

General Profile

to Screen 2.3.1

Contact Info

to Screen 2.4.1

Groups

to Screen 2.5

Comments

Stewardship

to Screen 2.9

Attributes

Stewardship

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

Print Report

to Screen 2.6.1

Add New

Date Range:

- View All -

Filter by Fund:

- View All -

Filter by Transaction Type:

- View All -

View Entire Household:

☒ View contributions by all household members

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

Edit Individual – Stewardship

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

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

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

Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

to Screen 2.2.1

General Profile

to Screen 2.3.1

Contact Info

to Screen 2.4.1

Groups

to Screen 2.5

Comments

Stewardship

to Screen 2.9

Attributes

Stewardship

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

Print Report

to Screen 2.6.1

Add New

Date Range:

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

<u>2006-09-22</u>	Keri Brown	Support > Keith Blackford	Check #2462	\$733.11	\$733.11
<u>2008-03-07</u>	Keri Brown	Ministry > Safari Kids	Stock Donation	\$473.41	\$473.41
<u>2008-11-28</u>	Jack Smith	Scholarship > 2009 Ninja Camp	Check #2498	\$982.38	\$982.38
<u>2008-12-29</u>	Keri Brown	Ministry > Student Ministries	Corp. Match (Pre-Tax)	\$502.22	\$502.22
<u>2009-03-29</u>	Jack Smith	Tithes/Offering	Credit Card (Online)	\$270.53	\$250.23

Merge Individuals, Find

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

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

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

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

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.

<u>First Name</u>	<u>LAST NAME</u> v	<u>Membership Status</u>	<u>Address</u>	<u>City</u>
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

- View All Statuses -

Refresh List

refreshes table below

Results: Viewing people 1-20 of 2141.

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

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

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.

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

☒ Married to Karen Smith since 1/21/2004

☒ Birthday: Feb 11, 1977

☐ Birthday: Feb 11

☒ Member since July 2, 2008

☐ Non-Member

Merge will go ahead and perform the merge.

Merge and Cancel will eventually redirect the user back to the **Screen 2.2.x** that is appropriate for this individual record.

Merge

Cancel

Edit Individual, Join a Household

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

Join a Household: “John Smith”

Home Address

Address 1: 425 Western Ave.

Address 2:

City, State, Postal Code:

Primary Home Phone: 650-555-1212

Alternate Home Phone: 650-824-1241

Alternate Home Phone: 650-555-1234

Add Another

Next

Cancel

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**.

Join a Household: "John Smith"

425 Western Ave., Sunnyvale, CA 94048

Does the household match any of the already-existing households listed below? If so, please select the household that it matches.
Otherwise, click on **"None Found – Create as a New Household"** below.

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

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
- etc.

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

Attribute "Types" include:

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

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

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

PEOPLEHOUSEHOLDSGROUPSCOMMUNICATIONSADMINISTRATIONLOG OUT

Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

General Profile

Contact Info

Groups

Comments

Stewardship

Attributes

to Screen 2.9.2
Add New

Attributes

Date Accepted Christ: January 1997

Edit

Spiritual Gifts: Healing, Prayer

Edit

Ministry Consultation Guide: Chris Warren

Edit

Ministry Consultation Date: February 5, 2005

Edit

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

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

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

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

Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

to Screen 2.2.1
General Profile

to Screen 2.3.1
Contact Info

to Screen 2.4.1
Groups

to Screen 2.5
Comments

to Screen 2.6
Stewardship

Attributes

to Screen 2.9.2
Add New

Attributes

Mini

Ministry Consultation Date: February 5, 2005

Edit

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

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Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

to Screen 2.2.1

General Profile

to Screen 2.3.1

Contact Info

to Screen 2.4.1

Groups

to Screen 2.5

Comments

to Screen 2.6

Stewardship

Attributes

to Screen 2.9.2

Add New

Attributes

Add an Attribute

Select Attribute: Date of Baptism ▼

Select

Cancel

Mini

Ministry Consultation Date: February 5, 2005

Edit

Search for a Household

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

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

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

Households must have at least one individual in it.

Individuals may be part of multiple households.

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

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Search for a Household

Search / Filter List

Name

Address

- View All Cities -

Refresh List

refreshes table below

Results: Viewing households 1-20 of 2141.

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

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**.

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

ALCF Church Management System

Welcome, Joe User

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Household: John Smith Household

Household Members

to Screen 3.3

Edit Roles

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

Home Address and Phone

3.4

Current	Address	City	Zip	Phone
Current Home	423 Main Street	Palo Alto, CA	94011	650-555-1212
[set as current]	123 Main Street, Apt. #3	Palo Alto, CA	94011	650-555-1212
[set as current]	1852 Mary Ave	Sunnyvale, CA	94087	408-421-1725

to Screen 3.5

to Screen 3.6

to Screen 3.7

to Screen 3.8

Add an Individual

Remove an Individual


Split this Household

Combine Households

ChMS Main IA.graffle

Thu Jan 21 2010

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Household: John Smith Household

Household Members

Role

Head

Spouse

Child

Home Address

Current

Current Home

[set as current]

[set as current]

Edit Household – Home Address and Phone

Home Address

Current/Previous: Current Home Address ▼

Address 1: 425 Western Ave.

Address 2:

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

Primary?

Primary Home Phone: 650-555-1212



Alternate Home Phone: 650-824-1241



Alternate Home Phone: 650-555-1234



Add Another

Update

Cancel

to Screen 3.5

Add an Individual

to Screen 3.6

Remove an Individual

to Screen 3.7

Split this Household

to Screen 3.8

Combine Households

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Household: John Smith Household

Household Members

Role

Head

Spouse

Child

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

Upon clicking "Next", the system will search to try any similarly-matched names in the system:

* If at least one similarly-matched names exists, the user will be directed to **Screen 3.5.1**

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

Home Address

Current

Current Home

[set as current]

[set as current]

Edit Household – Add Individual

Role in Household

Role: Parent

Name Information

Title: - None -

First Name: Patrick

Middle Name or Initial:

Last Name: Smith

Suffix: - None -

Goes By:

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

Biographical Information

Date of Birth: mm/dd/yyyy



Gender: Male

Next

Cancel

to Screen 3.5

Add an Individual

to Screen 3.6

Remove an Individual

to Screen 3.7

Split this Household

to Screen 3.8

Combine Households

Edit Household – Reconcile Added Individual

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

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

"Create..." will create the entry as a new individual and will place the newly created individual into this household. The dialog box will then close and the user will be taken back to **Screen 3.2**.

"Select" will have the system check to see if the individual is already part of a multi-person household:
* If yes, then the system will add the individual into this household.
* If no, then the system will merge the individual's single-person household into this household.
Either way, the dialog box will then close and the user will be taken back to **Screen 3.2**.

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

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Household: John Smith Household

Household Members

Role

Head

Spouse

Child

Edit Household – Add Individual

Matched Individuals

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

Back

Create Patrick Smith as a New Individual

Cancel

Home Address and Phone for the John Smith Household

to Screen 3.4

Add New

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

to Screen 3.5

Add an Individual

to Screen 3.6

Remove an Individual

to Screen 3.7

Split this Household

to Screen 3.8

Combine Households

Household: John Smith Household

Household Members

to Screen 3.3

Edit Roles

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

Remove an Individual

Note that only non-head household members that are already part of another household can be removed (for example, a child that is already part of another household). If you wish to remove a household member who's only household is this household, you will need to click on **"Split This Household"**.

Individual to Remove: Jack Smith

Remove

Cancel

Home Address and Phone

Current	Address	City	Zip	Phone
Current Home	423 Main Street	Palo Alto, CA	94011	650-555-1212
[set as current]	123 Main Street, Apt. #3	Palo Alto, CA	94011	650-555-1212
[set as current]	1852 Mary Ave	Sunnyvale, CA	94087	408-421-1725

to Screen 3.5

Add an Individual

to Screen 3.6

Remove an Individual

to Screen 3.7

Split this Household

to Screen 3.8

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".

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Household: John Smith Household

Household Members

Role

Head

Spouse

Child

Home Address

Current

Current Home

[set as current]

[set as current]

Split This Household

Household Members to Split:

☐ John Smith

☒ Keri Brown

☐ Jack Smith

Head of New Household:

Keri Brown

New Household's Home Address Info

Address 1: 425 Western Ave.

Address 2:

City, State, Postal Code:

City

- State -

Postal Code

Primary Home Phone: 650-555-1212

Primary?



Alternate Home Phone: 650-824-1241



Alternate Home Phone: 650-555-1234



Add Another

Split

Cancel

to Screen 3.5

Add an Individual

to Screen 3.6

Remove an Individual

to Screen 3.7

Split this Household

to Screen 3.8

Combine Households

Edit Household – Combine Households

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

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

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

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

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

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Household: John Smith Household

Household

Role

Head

Spouse

Child

Home Address

Current

Current Home

[set as current]

[set as current]

Combine Households

Search for a Household to Combine

Name: Carl Smith

Address: 425 Western Ave.

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

Head of Combined Household:

John Smith

Combine

Cancel

to Screen 3.5

Add an Individual

to Screen 3.6

Remove an Individual

to Screen 3.7

Split this Household

to Screen 3.8

Combine Households

View Groups – Example for Worship Arts

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

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

Groups can have an email alias (e.g. realworld@groups.alcf.net) 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.

View Groups in “Worship Arts”

Ministry:

Worship Arts

Refresh List

 refreshes table below

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

View Groups in “Growth Groups”

Ministry:

Growth Groups

Refresh List

refreshes table below

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

Create a New Group for Type:

Regular Group

Create

View Roles in Worship Arts

to Screen 4.5

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

View Group – type "Category"

Groups must be affiliated with at least one ministry.

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

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

Group Category "Growth Groups"

CONFIDENTIAL

only displayed if group is "Confidential"

Ministry: Growth Groups

Parent Category: none

Email List Preferences: Announce Only – gg@groups.alcf.net

to Screen 4.3.1

Edit

Groups in this Category

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

Members in the Groups in this Category

First Name	Last Name	Email	Group(s)	Role(s)
<u>Reseda</u>	<u>Adams</u>	radams3769@sbcglobal.net	Mountain View 01	Member
<u>Bianca</u>	<u>Anderson</u>	biancaa5054@aol.com	San Francisco 02	Member
<u>Helen</u>	<u>Anderson</u>	handerson5214@hotmail.com	San Francisco 02 and Mountain View 01	Faciliator and Member
<u>Bertina</u>	<u>Baker</u>	bbaker685@rice.edu	Palo Alto 01	Member
<u>Estra</u>	<u>Barry</u>	estrab5615@earthlink.net	Mountain View 01	Member
<u>Adal</u>	<u>Bell</u>	abell5978@sbcyahoo.com	Palo Alto 01	Host
<u>Josephine</u>	<u>Bennett</u>	josephineb1823@mail.nasa.gov	Mountain View 01	Member
<u>Carly</u>	<u>Boyle</u>	carly.boyle8193@gmail.com	San Francisco 01	Faciliator
<u>Florinda</u>	<u>Brady</u>	fbrady5889@attmail.com	San Francisco 01	Member
<u>Salena</u>	<u>Brooks</u>	salena.brooks4331@rocketmail.com	San Francisco 02 and Mountain View 01	Member
<u>Bina</u>	<u>Brown</u>	bina.brown8127@mail.nasa.gov	San Francisco 02 and Mountain View 01	Faciliator and Member
<u>Ollie</u>	<u>Brown</u>	ollieb8308@excite.com	San Francisco 02	Member
<u>Owen</u>	<u>Burns</u>	owenb213@lycos.com	San Francisco 01	Member
<u>Rosalie</u>	<u>Burns</u>	rosalieb9352@rocketmail.com	San Francisco 01	Member
<u>Barbara</u>	<u>Butler</u>	bbutler7368@earthlink.net	Mountain View 01	Faciliator
<u>Alice</u>	<u>Carter</u>	alice.carter8397@attmail.com	San Francisco 01	Member
<u>Neal</u>	<u>Carter</u>	neal.carter8613@attmail.com	San Francisco 02	Host
<u>Virginia</u>	<u>Casey</u>	vcasey8472@rocketmail.com	San Francisco 02 and Mountain View 01	Member and Host
<u>Malva</u>	<u>Chan</u>	malva.chan5081@rice.edu	San Francisco 01	Member
<u>Perce</u>	<u>Chang</u>	pchang7735@excite.com	San Francisco 02 and Mountain View 01	Faciliator

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

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

View Group – type "Growth"

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

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

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**

Add a Member

Members in this Group

Edit	First Name	Last Name	Email	Current Role(s)
Edit	Adrian	Dwyer	adriand4787@sbcyahoo.com	Member and Host
Edit	Albin	Kennedy	albink3514@aol.com	Member
Edit	Algie	O'Keeffe	algio5839@aol.com	Member
Edit	Barnet	Hall	bhall6400@lycos.com	Member
Edit	Beck	Power	bpower1881@northwestern.edu	Member
Edit	Bessie	Hall	bhall7757@rocketmail.com	Member
Edit	Bret	Shaw	bret.shaw5743@hotmail.com	Member
Edit	Burton	Long	burtonl6946@excite.com	Member
Edit	Cass	Donnelly	cass.donnelly7307@northwestern.edu	Member
Edit	Colton	Wright	cwright1882@gmail.com	Member
Edit	Daff	Bell	dbell6829@northwestern.edu	Member
Edit	Della	Kenney	dellak8136@excite.com	Member
Edit	Dexter	Sweeney	dexters8223@sbcyahoo.com	Member and Faciliator
Edit	Donna	Lee	dlee2597@aol.com	Member
Edit	Drake	Cook	drakec2240@gmail.com	Member
Edit	Drina	Liu	dliu2887@hotmail.com	Member and Faciliator
Edit	Ebony	Hill	ehill9983@earthlink.net	Member and Host

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

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

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

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

[Peninsula](#)

> [San Francisco 01](#)

> [San Francisco 02](#)

[South Bay](#)

> [Mountain View 01](#)

> [Palo Alto 01](#)

Members in the Group

First Name

[Reseda](#)

[Bianca](#)

[Helen](#)

[Bertina](#)

[Estra](#)

[Adal](#)

[Josephine](#)

[Carly](#)

[Florinda](#)

[Salena](#)

[Bina](#)

[Ollie](#)

[Owen](#)

[Rosalie](#)

[Barbara](#)

[Alice](#)

[Neal](#)

[Virginia](#)

[Malva](#)

[Perce](#)

General Information

Name:

Growth Groups

Parent Category:

- None -

Confidential?:

☐ Check if Confidential

Ministries:

Growth Groups

Family

Safari Kids

Student Ministries

Worship Arts

Email List Preferences

Email List Type:

Announcement Only

Name:

gg

Update

Cancel

Brady	fbrady5889@attmail.com	San Francisco 01	Member
Brooks	salena.brooks4331@rocketmail.com	San Francisco 02 and Mountain View 01	Member
Brown	bina.brown8127@mail.nasa.gov	San Francisco 02 and Mountain View 01	Faciliator and Member
Brown	ollieb8308@excite.com	San Francisco 02	Member
Burns	owenb213@lycos.com	San Francisco 01	Member
Burns	rosalieb9352@rocketmail.com	San Francisco 01	Member
Butler	bbutler7368@earthlink.net	Mountain View 01	Faciliator
Carter	alice.carter8397@attmail.com	San Francisco 01	Member
Carter	neal.carter8613@attmail.com	San Francisco 02	Host
Casey	vcasey8472@rocketmail.com	San Francisco 02 and Mountain View 01	Member and Host
Chan	malva.chan5081@rice.edu	San Francisco 01	Member
Chang	pchang7735@excite.com	San Francisco 02 and Mountain View 01	Faciliator

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

PEOPLE

HOUSEHOLDS

GROUPS

COMMUNICATIONS

ADMINISTRATION

LOG OUT

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Growth Group "San Francisco 02"

to Screen 4.3.1

Edit

Ministry: Growth Groups

People in Growth Group "San Francisco 02"

Email List

Members in

Edit First Name

Edit Adrianna

Edit Albin

Edit Algie

Edit Barne

Edit Beck

Edit Bessie

Edit Bret

Edit Burton

Edit Cass

Edit Colton

Edit Daff

Edit Della

Edit Dexter

Edit Donna

Edit Drake

Edit Drina

Edit Ebony

Sweeney

Lee

Cook

Liu

Hill

dexters8225@sbccyan06.com

dlee2597@aol.com

drakec2240@gmail.com

dliu2887@hotmail.com

ehill9983@earthlink.net

Member and Faciliator

Member

Member

Member and Faciliator

Member and Host

Edit Group Membership for "John Smith" in "San Francisco 02"

Membership Status

Current Roles: Member
Host

Add a New Role

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

Edit a Membership Period

Role: Host

Membership Started: Jul 23, 2009

Membership Ended: mm/dd/yyyy

This "Edit a Membership 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 Membership Start Date are required. Membership End Date is optional.

Okay

Update

Cancel

to Screen 4.4.2

Add a Member

PEOPLE

HOUSEHOLDS

GROUPS

COMMUNICATIONS

ADMINISTRATION

LOG OUT

Welcome, Joe User

102

Growth Group “San Francisco 02”

Ministry:

Parent Category:

Email List Preferences:

Members in this Group

Edit	First Name
Edit	Adrian
Edit	Albin
Edit	Algie
Edit	Barnet
Edit	Beck
Edit	Bessie
Edit	Bret
Edit	Burton
Edit	Cass
Edit	Colton
Edit	Daff
Edit	Della
Edit	Dexter
Edit	Donna
Edit	Drake
Edit	Drina
Edit	Ebony

to Screen 4.3.1

Edit

to Screen 4.4.2

Add a Member

Add a New Member to “San Francisco 02”

Role in Group

Role:

Faciliator

Membership Started:

Jul 23, 2009

Membership 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

ChMS Main IA.graffle

Thu Jan 21 2010

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ALCF

Advancing the Love of Jesus Christ

768 px

+240 px

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"

to Screen 4.3.1

Edit

Ministry:

Parent Category:

Email List Preferences:

Members in this Group

Edit	First Name	Last Name	Address	Email
Edit	Adrian			
Edit	Albin			
Edit	Algie			
Edit	Barnet			
Edit	Beck	Power	bpower1881@northwestern.edu	Member
Edit	Bessie	Hall	bhall7757@rocketmail.com	Member
Edit	Bret	Shaw	bret.shaw5743@hotmail.com	Member
Edit	Burton	Long	burtonl6946@excite.com	Member
Edit	Cass	Donnelly	cass.donnelly7307@northwestern.edu	Member
Edit	Colton	Wright	cwright1882@gmail.com	Member
Edit	Daff	Bell	dbell6829@northwestern.edu	Member
Edit	Della	Kenney	dellak8136@excite.com	Member
Edit	Dexter	Sweeney	dexters8223@sbcyahoo.com	Member and Faciliator
Edit	Donna	Lee	dlee2597@aol.com	Member
Edit	Drake	Cook	drakec2240@gmail.com	Member
Edit	Drina	Liu	dliu2887@hotmail.com	Member and Faciliator
Edit	Ebony	Hill	ehill9983@earthlink.net	Member and Host

to Screen 4.4.2

Add a Member

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

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.

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

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

ALCF Church Management System

Welcome, Joe User

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

View Roles in "Worship Arts"

Edit / Delete	Role
Edit Delete	Actor
Edit Delete	Leader
Edit Delete	Musician
Edit Delete	Participant
Edit Delete	Singer

Role Name:

Add Role

updates the above list and saves changes

Back to View Groups

to Screen 4.1.1

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

Administration Menu

View Users

View and Manage Users of the ChMS System

goes to **Screen 6.2**