**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.

Passwords are their Windows Domain network password.

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

**ALCF** Church Management System

1024 px

# 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**

768 px

+240 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:
• Staff User
• ChMS Administrator

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

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

**ALCF** Church Management System

Welcome, **Joe User**

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

# 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**

768 px

**Search for an Individual**

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

Each individual can be a membership status of type:
• Member
• Non-Member/Tithe
• ?
• ?

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

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

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

# 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 |

**View an Individual – General Profile Tab
Single Household**

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

Depending on the type of individual, the screen the
individual would show up on would be on one of the
following wireframes:
• Individual that is part of a single household would
be displayed on **Screen 2.2**
• Individual that is not part of any households (e.g.
single person) would be displayed on **Screen 2.2.1**
• Individual that is part of multiple households would
be displayed on **Screen 2.2.2**

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

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

There can only be one Head of Household.

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

---

**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

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

Edit
to **Screen 2.2.4**

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

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

Edit
to **Screen 2.2.5**

**Marital Status:** Married, to Keri Brown on June 24, 2006 (3 years)
**Household:** Head of the Smith Household        to **Screen 3.2**

Details
to **Screen 2.3.1**

**Primary Contact Info:** 425 Western Avenue
Sunnyvale, CA  94086

408-555-1212
jsmith@gmail.com

Edit
to **Screen 2.2.5**

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

*View Change Log*

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

See **Screen 2.2** for notes.

**ALCF** Church Management System

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

# Individual: John Smith

to **Screen 2.3.2**    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**
*Individual*

Edit
to **Screen 2.2.3**

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

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

Edit
to **Screen 2.2.4**

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

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

Edit
to **Screen 2.2.5**

**Marital Status:** Single
**Household:** None – Individual    to **Screen 3.2**

Details
to **Screen 2.3.1**

**Primary Contact Info:** 425 Western Avenue
Sunnyvale, CA  94086

408-555-1212
jsmith@gmail.com

Edit
to **Screen 2.2.5**

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

*View Change Log*

View an Individual – General Profile Tab
Multiple Households

See **Screen 2.2** for notes.

| 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

**Keri Smith**
*Head*

**Chris Smith**
*Spouse*

**John Smith**
*Child*

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:** Non-Member

Edit
to **Screen 2.2.6**

Edit
to **Screen 2.2.5**

**Marital Status:** Single
**Households:** Child in the <u>Smith Household</u>        to **Screen 3.2**
Child in the <u>Adams Household</u>
Child in the <u>Westfield Household</u>

Details
to **Screen 2.3.1**

**Primary Contact Info:** 425 Western Avenue
Sunnyvale, CA  94086

408-555-1212
<u>jsmith@gmail.com</u>

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

**Westfield Household**
1852 Mary Ave, Sunnyvale

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.

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

**Edit an Individual – General Information**

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

# 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**  to **Screen 2.4.1**  to **Screen 2.5**  to **Screen 2.6**

General Profile   Contact Information   Groups   Comments   Stewardship

### Edit Name Information

## Name Information

**Title:** Dr.

**First Name:** Jonathan

**Middle Name or Initial:** Mark

**Last Name:** Smith

**Suffix:** III

to **Screen 2.2.5**

Edit

**Goes By:** John 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 either just a Month/Day combination OR a full Month/Day/Year combination.

**Date of Birth:** mm/dd/yyyy

**Gender:** Male

**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*

**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.

# ALCF Church Management System

| 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

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**.

**Current Status:** Member

Add a Membership Period

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

Close

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

| 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

768 px

**ChMS Main IA.graffle**
Thu Jan 07 2010
Page 8 of 35

ALCF

+240 px

**Edit an Individual – Membership Dates**

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

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

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

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

---

# ALCF Church Management System

| 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]  [📅]

**Update**    Cancel

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

*View Change Log*

**Edit an Individual – Family and Households**

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

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

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

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

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

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

---

# 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**  to **Screen 2.4.1**  to **Screen 2.5**  to **Screen 2.6**

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

Edit
to Screen 2.2.3

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

Edit
to **Screen 2.2.5**

### Edit Household Information

## Family Information

**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 |

**Update**   Cancel

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

*View Change Log*

768 px

+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.

**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

**Smith Household**
425 Western Ave, Sunnyvale

**John Smith**
*Head*

**Keri Brown**
*Spouse*

**Jack Smith**
*Child*

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 |

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:**

**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
Single Household**

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

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

Clicking on any of the addresses allows the user to edit the address information -- but it's primarily to be used to edit/fix mistakes. If a new address is to be reported (e.g. due to a move), the **Add New** button should be used instead, so that old/historic home address information can be kept in the system.

Clicking on any address or the **Add New** button will redirect the user to **Screen 2.3.2**.

Clicking on **Set as Current** will simply relabel the address as the "Current Home" address. Any "Current Home" address will be set as a Previous Home address.

For multi-person households, changes will apply to all members of the household.

Clicking on any address in "other addresses" or the **Add New** button will redirect the user to **Screen 2.3.3**.

Address Types for "other addresses" can be:
• Current Work
• Previous Work
• Previous Home (only for individuals who are in at least one multi-person household)
• Other

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

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

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

Only one phone can be set as "Primary".

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

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

---

# 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**

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

**Smith Household**
425 Western Ave, Sunnyvale

**John Smith**
*Head*

**Keri Brown**
*Spouse*

**Jack Smith**
*Child*

### Home Address and Phone for the Smith Household

to **Screen 2.3.2**  **Add New**

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

### Other Addresses for John Smith

to **Screen 2.3.3**  **Add New**

| Address 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 |

### 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 |

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

*View Change Log*

**Edit an Individual – Household Address and Phone**

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

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

Options are:
• Current Home Address
• Previous Home Address

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

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

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

---

**ALCF** Church Management System

Welcome, **Joe User**

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

## Individual: John Smith

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

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

**Smith Household**
425 Western Ave, Sunnyvale

**John Smith**
*Head*

**Keri Brown**
*Spouse*

**Jack Smith**
*Child*

### Home Address and Phone for the Smith Household

to **Screen 2.3.2**
Add New

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

to **Screen 2.3.3**
Add New

---

### Edit Household – Home Address and Phone

## Home Address

**Current/Previous:** [ Current Home Address ▼ ]

**Address 1:** [ 425 Western Ave. ]

Address 2: [ ]

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

**Primary?**

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

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

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

**Add Another**

**Update**   Cancel

---

to **Screen 2.3.5**
Add New

l Address

smith@gmail.com

1231@yahoo.com

.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 |

*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. This is only applicable for individuals that are part of at least one multi-person household.

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

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

---

**ALCF** Church Management System

Welcome, **Joe User**

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

# Individual: John Smith

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

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

**Smith Household**
425 Western Ave, Sunnyvale

**John Smith**
*Head*

**Keri Brown**
*Spouse*

**Jack Smith**
*Child*

## Home Address and Phone for the Smith Household

to **Screen 2.3.2**
Add New

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

## Other Addresses for John Smith

to **Screen 2.3.3**
Add New

---

### Edit Other Address

## Address Information

**Address Type:** [ Current Work ▼ ]

**Address 1:** [ 2810 Coleman Avenue ]

Address 2: [ ]

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

[ Update ] [ Cancel ]

---

to **Screen 2.3.5**
Add New

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

smith@gmail.com
1231@yahoo.com

Email Address

## 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 |

768 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**

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

**Smith Household**
425 Western Ave, Sunnyvale

**John Smith**
*Head*

**Keri Brown**
*Spouse*

**Jack Smith**
*Child*

### Home Address and Phone for the Smith Household

to **Screen 2.3.2**
Add New

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

### Other Addresses for John Smith

to **Screen 2.3.3**
Add New

---

### Edit Phone Number

## Phone Information

**Phone Type:** | Work ▾

**Primary?** | No ▾

**Phone Number:** | 408-555-2123

Update    Cancel

---

to **Screen 2.3.5**
Add New

il Address

smith@gmail.com

jsmith1231@yahoo.com

| [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 |

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**

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

**Smith Household**
425 Western Ave, Sunnyvale

**John Smith**
*Head*

**Keri Brown**
*Spouse*

**Jack Smith**
*Child*

### Home Address and Phone for the Smith Household

to **Screen 2.3.2**
Add New

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

### Other Addresses for John Smith

to **Screen 2.3.3**
Add New

---

### Edit Email Address

## Email Information

**Primary?**    No ▼

**Email Address:**    john.smith@gmail.com

Update    Cancel

---

to **Screen 2.3.5**
Add New

| [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 |

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

*View Change Log*

768 px

+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**

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

**Smith Household**
425 Western Ave, Sunnyvale

**John Smith**
*Head*

**Keri Brown**
*Spouse*

**Jack Smith**
*Child*

### Home Address and Phone for the Smith Household

to **Screen 2.3.2**
Add New

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

### Other Addresses for John Smith

to **Screen 2.3.3**
Add New

---

### Edit Other Contact Information

## Other Contact Information

**Contact Info Type:**   [ Twitter ID ▼ ]

**Value:**   [ john_smith_417 ]

to **Screen 2.3.5**
Add New

Address

[set as primary]   Home   408-281-2381        [set as primary]   jsmith@gmail.com

[ **Update** ]   [ Cancel ]

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 |

768 px

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

*View Change Log*

**View an Individual – Groups**

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

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

# ALCF Church Management System

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 2.5** | to **Screen 2.6**

**Smith Household**
425 Western Ave, Sunnyvale

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

**John Smith**
*Head*

**Keri Brown**
*Spouse*

**Jack Smith**
*Child*

### Ministry Participation

to **Screen 2.4.2**

Add New

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

### Communication Lists

to **Screen 2.4.3**

Add New

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

*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.

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

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

Clicking on any date will show a date-textbox to appear over the date.

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

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

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

**Smith Household**
425 Western Ave, Sunnyvale

**John Smith**
*Head*

**Keri Brown**
*Spouse*

**Jack Smith**
*Child*

### Ministry Participation

to **Screen 2.4.2**
Add New

| Ministry | Role | Dates of Involvement |
| --- | --- | --- |
| Safari Kids | Volunteer | April 2009 - Present<br>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 |

### Edit Ministry Participation

**Ministry:** Growth Groups

**Sub-Ministry:** Mountain View 2

**Role:** Participant

| Participation Started | Participation Ended |
| --- | --- |
| May 1, 2004 | Enter a Date |
| Mar 4, 1999 | Apr 24, 2001 |
| Jul 23, 1994 | Sep 15, 1997 |
| Jul 23, 1994 | Sep 15, 1997 |

Save    Cancel

Add a Membership Period

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

*View Change Log*

768 px

+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).

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

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

**Smith Household**
425 Western Ave, Sunnyvale

**John Smith**
*Head*

**Keri Brown**
*Spouse*

**Jack Smith**
*Child*

## Ministry Participation

to **Screen 2.4.2**
Add New

| Ministry | Role | Dates of Involvement |
|---|---|---|
| Safari Kids | Volunteer | April 2009 - Present<br>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 |

to **Screen 2.4.3**
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***

768 px

+240 px

*View Change Log*

# ALCF Church Management System

| 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

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

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

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

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

## Individual: John Smith

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

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

**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 Comment Type:**          **Filter by Hidden State:**

- View All -                              - View All -                              ☑ 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. |

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

*View Change Log*

768 px

**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**.

**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 2.6**

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

**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 Comment Type:**          **Filter by Hidden State:**

Hidden Comments

---

**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

Save      Cancel

---

dictumst.  Nullam commodo arcu sit
...tasse platea dictumst.  Proin sem
...commodo et, tempus vitae, purus.
...hasellus quis urna quis turpis.

...oncus hendrerit, erat metus blandit
...massa eget turpis.  Suspendisse non

...Maecenas sed urna.  Morbi sagittis.
...cus ut nibh.  Integer ut libero.
...bis quis faucibus sagittis.

...  Ut euismod, urna ac rhoncus

...met hendrerit imperdiet, erat nulla
...um sapien lectus sed urna.
...Suspendisse potenti.  Praesent.

...primis in faucibus orci luctus et
...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. |

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**

| General Profile | Contact Info | Groups | Comments | **Stewardship** |
|---|---|---|---|---|

## Stewardship

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

to **Screen 2.6.1**

[ Print Report ]   [ 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 |

*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

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

**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

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 |
| ax) | $333.89 | $333.89 |
| | $976.54 | $976.54 |
| ) | $995.02 | $945.28 |
| | $763.91 | $763.91 |
| ax) | $409.72 | $409.72 |
| | $260.54 | $260.54 |
| | $994.58 | $994.58 |
| Tax) | $802.85 | $802.85 |
| | $307.21 | $307.21 |
| | $555.35 | $555.35 |
| ) | $268.17 | $244.25 |
| | $742.62 | $742.62 |
| ax) | $778.54 | $778.54 |
| ) | $274.73 | $251.23 |

| 2006-09-22 | 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 |

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

View Change Log

768 px

**ChMS Main IA.graffle**
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ALCF

+240 px

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

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: Smith Household

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

## Household Members

to **Screen 3.3**
[Edit Roles]

| Role | Name | Email | Phone |
|------|------|-------|-------|
| Head | John Smith | jsmith@gmail.com | 415-555-1212 |
| Spouse | Keri Brown | kbrown@gmail.com | 415-555-2211 |
| Child | Jack Smith | | |

## Home Address and Phone for the Smith Household

to **Screen 3.4**
[Add New]

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

to **Screen 3.5**
[Add an Individual]

to **Screen 3.6**
[Remove an Individual]

to **Screen 3.7**
[Split this Household]

to **Screen 3.8**
[Merge Households]

**Edit Household – Roles**

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

# ALCF Church Management System

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

## Household: Smith Household

### Household Members

to **Screen 3.3**
Edit Roles

| Role | Name | Email | Phone |
|------|------|-------|-------|
| Head | Jo | | |
| Spouse | Ke | | |
| Child | Jac | | |

**Edit Household Roles**

**John Smith:** Head ▼

**Karen Brown:** Spouse ▼

**Jack Smith:** Child ▼

Save    Cancel

### 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 |

Add an Individual

Remove an Individual

Split this Household

Merge Households

768 px

**ALCF Church Management System IA
Membership Subsystem
3.4 Edit Household, Address and Phone**

**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: 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**
Merge Households

768 px

**ChMS Main IA.graffle**
Thu Jan 07 2010
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ALCF

+240 px

# ALCF Church Management System

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

## Household: Smith Household

### Household

| 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 Addre

| Current |
|---|
| Current Home |
| [set as current] |
| [set as current] |

---

## Edit Household – Add Individual

### Role in Household

**Role:** Parent ▼

### Name Information

**Title:** - None - ▼

**First Name:** Patrick

**Middle Name or Initial:** 

**Last Name:** Smith

**Suffix:** - None - ▼

**Goes By:** 

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

### Biographical Information

**Date of Birth:** mm/dd/yyyy 📅

**Gender:** Male ▼

Next    Cancel

---

to **Screen 3.5**
Add an Individual

to **Screen 3.6**
Remove an Individual

to **Screen 3.7**
Split this Household

to **Screen 3.8**
Merge Households

768 px

**ChMS Main IA.graffle**
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+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**.

---

Welcome, **Joe User**

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

## Household: 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 Smith Household

to **Screen 3.4**
Add New

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

to **Screen 3.5**
Add an Individual

to **Screen 3.6**
Remove an Individual

to **Screen 3.7**
Split this Household

to **Screen 3.8**
Merge Households

**Edit Household – Remove an Individual**

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

**ALCF** Church Management System

Welcome, **Joe User**

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

## Household: 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).  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

---

to **Screen 3.5**
Add an Individual

to **Screen 3.6**
Remove an Individual

to **Screen 3.7**
Split this Household

to **Screen 3.8**
Merge Households

768 px

+240 px

102

**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: Smith Household

## Household Mem

| Role | N |
| --- | --- |
| Head | J |
| Spouse | K |
| Child | J |

## 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**
[ Merge Households ]

768 px

**Edit Household – Split Households**

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

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

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

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

**ALCF** Church Management System

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

# Household: Smith Household

## Househ...

| Role |
|---|
| Head |
| Spouse |
| Child |

## Home A...

| Current |
|---|
| Current Hom... |
| [set as curre... |
| [set as curre... |

---

**Merge Households**

### Search for a Household or Individual to Merge

**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 Merged Household:** John Smith ▼

**Merge**    Cancel

---

to **Screen 3.5**
Add an Individual

to **Screen 3.6**
Remove an Individual

to **Screen 3.7**
Split this Household

to **Screen 3.8**
Merge Households

**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.

# 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 |

# 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 |