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

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**

ChMS Main IA.graffle
Fri Jan 15 2010
Page 1 of 48

ALCF

1024 px
+240 px
768 px

Main Menu

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

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

There are two roles for Staff Members who are using the ChMS Membership Subsystem:
• 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

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**

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
• None
• ?

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.

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

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

John 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**

Merge Records

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

View Change Log

View an Individual – General Profile Tab
Single-Person Household

See **Screen 2.2** for notes.

ALCF Church Management System

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

John 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: <u>Individual</u>   to **Screen 3.2**

Edit
to **Screen 2.2.5**

Details
to **Screen 2.3.1**

Primary Contact Info: 425 Western Avenue
Sunnyvale, CA 94086

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

Merge Records

*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.

Note that because this individual's data is incomplete, users have limited access for this individual.

Individual's without any households:
* cannot have any membership status (it is "None" by default)
* cannot have any physical addresses assigned to them
* cannot track stewardship

ALCF Church Management System

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Individual: John Smith

No Household
Create One   to **Screen 2.8**

John Smith
Individual

Merge Records

to **Screen 2.3.1.1**	to **Screen 2.4.1**	to **Screen 2.5**
General Profile	Contact Information	Groups	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: None (Member Not Part of a Household)

Edit
to **Screen 2.2.5**

Marital Status: Single
Household: None

Edit
to **Screen 2.2.5**

Details
to **Screen 2.3.1.1**

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

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

View Change Log

View an Individual – General Profile Tab Multiple Households

See **Screen 2.2** for notes.

ALCF Church Management System

Welcome, **Joe User**

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Individual: John Smith

John Smith Household
425 Western Ave, Sunnyvale

Keri Smith
Head

Chris Smith
Spouse

John Smith
Child

Merge Records

Rick Adams Household
123 Main Street, Palo Alto

Amber Westfield Household
1852 Mary Ave, Sunnyvale

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: 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 Smith Household   to Screen 3.2
Child in the Adams Household
Child in the Westfield Household

Details
to Screen 2.3.1

Primary Contact Info: 425 Western Avenue
Sunnyvale, CA 94086

408-555-1212
jsmith@gmail.com

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

View Change Log

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

768 px

Edit an Individual – General Information

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

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

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

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

ALCF Church Management System

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 2.2.5**

Edit Name Information

Name Information

Title: Dr.

First Name: Jonathan

Middle Name or Initial: Mark

Last Name: Smith

Suffix: III

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: mm/dd/yyyy

Gender: Male

Update | Cancel

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

View Change Log

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ALCF

768 px

+240 px

Edit an Individual – Membership Information

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

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

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**.

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**

Current Status: Member

Add a Membership Period

Close

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

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

View Change Log

Edit an Individual – Membership Dates

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

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

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

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

ALCF Church Management System

Welcome, **Joe User**

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

Individual: John Smith

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

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

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

Edit
to **Screen 2.2.3**

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

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

Edit
to **Screen 2.2.5**

Edit Membership Information

Edit a Prior Membership

Membership Started: [mm/dd/yyyy] [📅]

Membership Ended: [mm/dd/yyyy] [📅]

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

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ALCF

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*

768 px

+240 px

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ALCF Church Management System

Welcome, **Joe User**

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

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

to **Screen 2.2.1** — General Profile
to **Screen 2.4.1** — Groups
to **Screen 2.5** — Comments
to **Screen 2.6** — Stewardship

Contact Info

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

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.

ALCF Church Management System

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Individual: John Smith

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

General Profile	Contact Info	Groups	Comments

No Household
Create One   to **Screen 2.8**

John Smith
Individual

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?"

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

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

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

---

to **Screen 2.3.3** Add New

to **Screen 2.3.5** Add New

il 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]

[Delete]   [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		

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

768 px

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

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

Delete   **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		

...smith@gmail.com

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 – 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]

| Delete | | Update | Cancel |

---

to **Screen 2.3.5**
Add New

[set as primary]	Home	408-281-2381	[set as primary]	jsmith@gmail.com
[set as primary]	Mobile	415-552-9138	[set as primary]	jsmith1231@yahoo.com
[set as primary]	Work	650-228-1248	[set as primary]	john.f.smith@company.org
[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

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

Delete   Update   Cancel

---

to **Screen 2.3.5**
Add New

			Email Address
[set as primary]	Home	408-281-2381	jsmith@gmail.com
[set as primary]	Mobile	415-552-9138	jsmith1231@yahoo.com
[set as primary]	Work	650-228-1248	[set as primary]
[set as primary]	Work	650-228-1200	john.f.smith@company.org
[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

ALCF Church Management System

Welcome, **Joe User**

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

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**.

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 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

768 px

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

View Change Log

Edit Individual — Ministry Participation (Add)

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

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 Sm
Child

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

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.

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

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

Cancel

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

+240 px

Edit Individual — Ministry Participation

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

ALCF Church Management System

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 Sm
Head

Keri Bro
Spouse

Jack Sm
Child

to **Screen 2.4.2**
d New

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	Jul 23, 2009	Enter a Date
Member	Sep 18, 2008	Enter a Date
	Dec 4, 2007	Feb 28, 2008
	Jun 4, 2007	Aug 31, 2007

Edit a 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]

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+240 px

768 px

ChMS Main IA.graffle
Fri Jan 15 2010
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ALCF

Record last updated on **February 23, 2009** *by* <u>Doris Cohen</u>

<u>View Change Log</u>

Edit Individual — Communication List

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

ALCF Church Management System

Welcome, **Joe User**

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

Individual: John Smith

Smith Household
425 Western Ave, Sunnyvale

John Smith
Head

Keri Brown
Spouse

Jack Smith
Child

to **Screen 2.2.1**
General Profile

to **Screen 2.3.1**
Contact Info

Groups

to **Screen 2.5**
Comments

to **Screen 2.6**
Stewardship

Ministry Participation

to **Screen 2.4.2**
Add New

Ministry	Role	Dates of Involvement
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

to **Screen 2.4.4**
Add New

Subscribe Individual to a Communication List

Communication List: Super Fun Social Committee ▼

Subscribe   Cancel

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 – 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:
- 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.

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

View Change Log

Edit an Individual – Comments

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

A user can only edit his/her own comment.

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
...itasse 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

...amet 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.

*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

General Profile	Contact Info	Groups	Comments	Stewardship

Stewardship

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

[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

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**

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.

to **Screen 2.6.1**

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

Merge Individuals, Find

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

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

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

ALCF Church Management System

Welcome, **Joe User**

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Merge Individuals: "John Smith"

John Smith Household, 241 Main Street, Sunnyvale

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

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

Search / Filter List

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

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

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

768 px

Merge Individuals, Reconcile Data

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

ALCF Church Management System

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Merge Individuals: "John Smith"

Search for a Household

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

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

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

Households must have at least one individual in it.

Individuals may be part of multiple households.

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

ALCF Church Management System

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Search for a Household

Search / Filter List

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

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

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

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+240 px

View Household

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

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

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

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

ALCF Church Management System

Welcome, **Joe User**

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Household: John Smith Household

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

Household Members

to **Screen 3.3**
[Edit Roles]

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

Home Address and Phone for the John Smith Household

to **Screen 3.4**
[Add New]

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

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

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

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

to **Screen 3.8**
[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: John Smith Household

Household Members

to **Screen 3.3**
[Edit Roles]

Role	Name	Email	Phone
Head	Joh...		
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

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]

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**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**

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

Household: John Smith Household

Household

Role
Head
Spouse
Child

Home Addre

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

Edit Household – 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

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

Upon clicking "**Next**", the system will search to try any similarly-matched names in the system:
* If at least one similarly-matched names exists, the user will be directed to **Screen 3.5.1**
* If no similarly-matched names exist anywhere, then the individual will be created and added to this household and the dialog box will close (redirecting the user back to **Screen 3.2**)

ALCF Church Management System

Welcome, **Joe User**

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

Household: John Smith Household

Household

Role
Head
Spouse
Child

Home Addre

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

Edit Household – Add Individual

Role in Household

Role: Parent

Name Information

Title: - None -

First Name: Patrick

Middle Name or Initial:

Last Name: Smith

Suffix: - None -

Goes By:

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

Biographical Information

Date of Birth: mm/dd/yyyy

Gender: Male

Next   Cancel

to **Screen 3.5**
Add an Individual

to **Screen 3.6**
Remove an Individual

to **Screen 3.7**
Split this Household

to **Screen 3.8**
Merge Households

Edit Household – Reconcile Added Individual

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

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

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

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

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

ALCF Church Management System

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

Household: John Smith Household

Household M...

Role		
Head		
Spouse		
Child		

Edit Household – Add Individual

Matched Individuals

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

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

Home Address and Phone for the John Smith Household

to **Screen 3.4**
Add New

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

to **Screen 3.5**
Add an Individual

to **Screen 3.6**
Remove an Individual

to **Screen 3.7**
Split this Household

to **Screen 3.8**
Merge Households

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240 px

Edit Household – Remove an Individual

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

ALCF Church Management System

Welcome, **Joe User**

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

Household: John Smith Household

Household Members

to **Screen 3.3**
Edit Roles

Role	Name	Email	Phone
Head	Joh		
Spouse	Ke		
Child	Jac		

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 a

3.4

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

to **Screen 3.5**
Add an Individual

to **Screen 3.6**
Remove an Individual

to **Screen 3.7**
Split this Household

to **Screen 3.8**
Merge Households

Edit Household – Split Households

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

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

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

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

Current home address information for this household will remain unchanged.

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

ALCF Church Management System

Welcome, **Joe User**

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

Household: John Smith Household

Household Mem...

Role	N
Head	J
Spouse	K
Child	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: John 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 |

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768 px

+240 px

View Groups – Example for Worship Arts

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

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

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

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

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

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

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

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

ALCF Church Management System

Welcome, **Joe User**

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

View Groups in "Worship Arts"

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

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

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

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

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

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

ALCF Church Management System

Welcome, **Joe User**

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

View Groups in "Growth Groups"

Ministry: Growth Groups ▼   Refresh List   refreshes table below

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

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

Create a New Group for Type: Regular Group ▼   Create

View Roles in **Worship Arts**

to **Screen 4.5**

View Group – type "Category"

Groups must be affiliated with at least one ministry.

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

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

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

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

ALCF Church Management System

Welcome, **Joe User**

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

Group Category "Growth Groups"

CONFIDENTIAL

only displayed if group is "Confidential"

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

to **Screen 4.3.1**

[Edit]

Groups in this Category

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

Members in the Groups in this Category

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

View Group – type "Growth"

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

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

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

ALCF Church Management System

Welcome, **Joe User**

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Growth Group "San Francisco 02"

to **Screen 4.3.1**
Edit

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

to **Screen 4.4.2**

Members in this Group

Add a Member

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	algieo5839@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 Group

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

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

ALCF Church Management System

Welcome, **Joe User**

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Group Category "Growth Groups"

CONFIDENTIAL

only displayed if group is "Confidential"

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

to **Screen 4.3.1**

[Edit]

Groups in this Cate...

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

Members in the Gro...

First Name				
Reseda				
Bianca				
Helen				
Bertina				
Estra				
Adal				
Josephine				
Carly				

Edit Category Group

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]

First Name	Last Name	Email	Group	Role
Florinda	Brady	fbrady5889@attmail.com	San Francisco 01	Member
Salena	Brooks	salena.brooks4331@rocketmail.com	San Francisco 02 and Mountain View 01	Member
Bina	Brown	bina.brown8127@mail.nasa.gov	San Francisco 02 and Mountain View 01	Faciliator and Member
Ollie	Brown	ollieb8308@excite.com	San Francisco 02	Member
Owen	Burns	owenb213@lycos.com	San Francisco 01	Member
Rosalie	Burns	rosalieb9352@rocketmail.com	San Francisco 01	Member
Barbara	Butler	bbutler7368@earthlink.net	Mountain View 01	Faciliator
Alice	Carter	alice.carter8397@attmail.com	San Francisco 01	Member
Neal	Carter	neal.carter8613@attmail.com	San Francisco 02	Host
Virginia	Casey	vcasey8472@rocketmail.com	San Francisco 02 and Mountain View 01	Member and Host
Malva	Chan	malva.chan5081@rice.edu	San Francisco 01	Member
Perce	Chang	pchang7735@excite.com	San Francisco 02 and Mountain View 01	Faciliator

768 px

Edit Group Membership

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

ALCF Church Management System

Welcome, **Joe User**

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Growth Group "San Francisco 02"

to **Screen 4.3.1**

Edit

Ministry: Growth Groups

Email L

Members in

to **Screen 4.4.2**

d a Member

Edit	First
Edit	Adrian
Edit	Albin
Edit	Algie
Edit	Barne
Edit	Beck
Edit	Bessie
Edit	Bret
Edit	Burton
Edit	Cass
Edit	Colton
Edit	Daff
Edit	Della

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	Jul 23, 2009	Enter a Date
Member	Sep 18, 2008	Enter a Date
	Dec 4, 2007	Feb 28, 2008
	Jun 4, 2007	Aug 31, 2007

Edit a Membership Period

Role: Host ▼

Membership Started: Jul 23, 2009 [cal]

Membership Ended: mm/dd/yyyy [cal]

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]

Edit	Dexter	Sweeney	dexters8225@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

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ALCF

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+240 px

Add Group Membership

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

List of Roles is defined at the Ministry level.

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

ALCF Church Management System

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:

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

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

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]

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+240 px

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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

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Growth Group "San Francisco 02"

to **Screen 4.3.1**
Edit

Ministry:

Parent Category:

Email List Preferences:

to **Screen 4.4.2**
Add a Member

Members in this Group

Edit	First Name			
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

Add New Member to "San Francisco 02"

Matched Individuals

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

Back

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

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

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**

Main Administration Menu

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

ALCF Church Management System

PEOPLE	HOUSEHOLDS	GROUPS	COMMUNICATIONS	ADMINISTRATION	LOG OUT

Administration Menu

Vew Users	View and Manage Users of the ChMS System

goes to **Screen 6.2**

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