OPERATIONAL

MANUAL

SUNSHINE
ministries

Created by Merry Mac

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1. Introduction

The Sunshine Ministries Contacts Database was created by Merry Mac, a group of students from St. Louis Community College at Meramec. Our intention was to create a free, efficient, and easy to use “virtual address book” for Sunshine Ministries.

The intention of this manual is to provide instruction and helpful tips on the use of the Sunshine Ministries Contacts Database.

Helpful Tip! To more easily navigate this manual, select “CTRL-F” on your keyboard and search keywords such as “add contact” or “edit action” in order to find the appropriate instructions.

2. Getting Started

In this section, the basic functions of the application will be discussed including logging in and creating and editing Contacts and Actions.

2.1 Logging In

Opening the application will bring you directly to the login screen seen below.

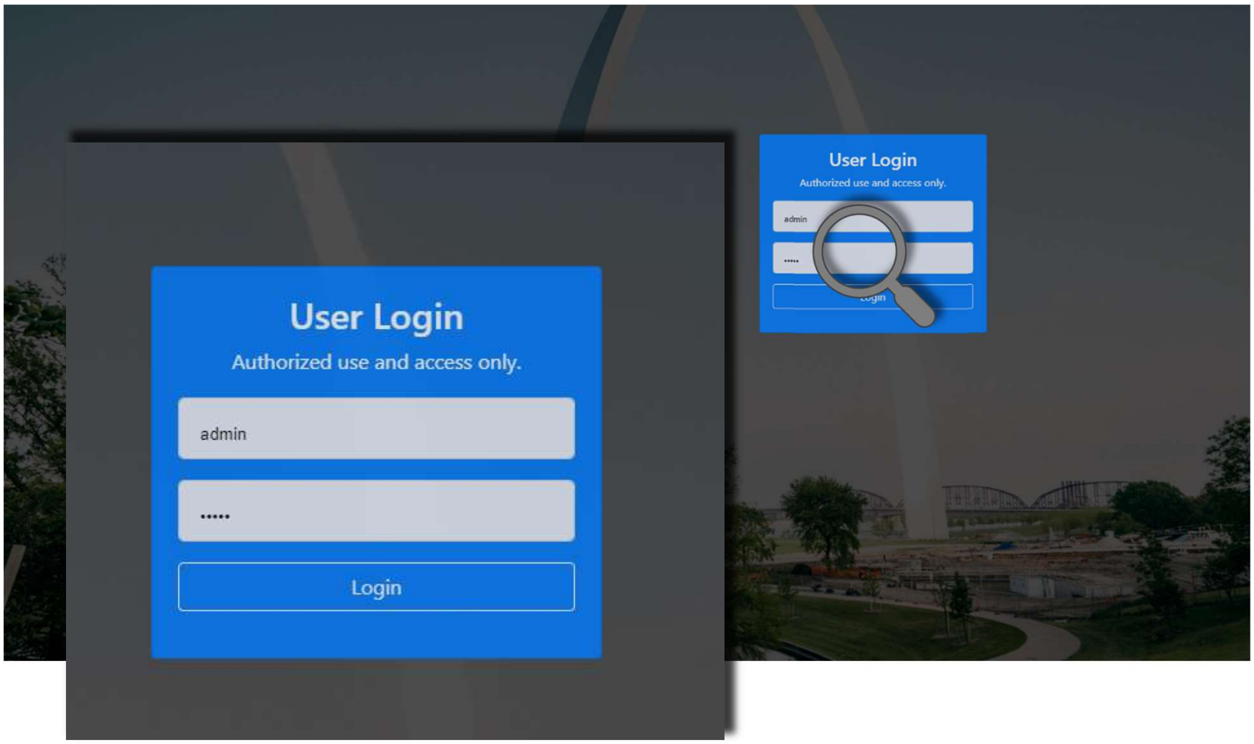

Figure 1: Login Screen

To Log In: Enter your username into the upper box, and your password into the lower box. Click "Login."

2.2 Navigating the Home Page

The first page that you will see after logging into the Sunshine Ministries Contacts Database is the Dashboard or "Home" page. Several functions, such as adding a new Contact, can be performed from the page seen below. To return to this page after leaving, simply click the "Home" link on the navigation bar.

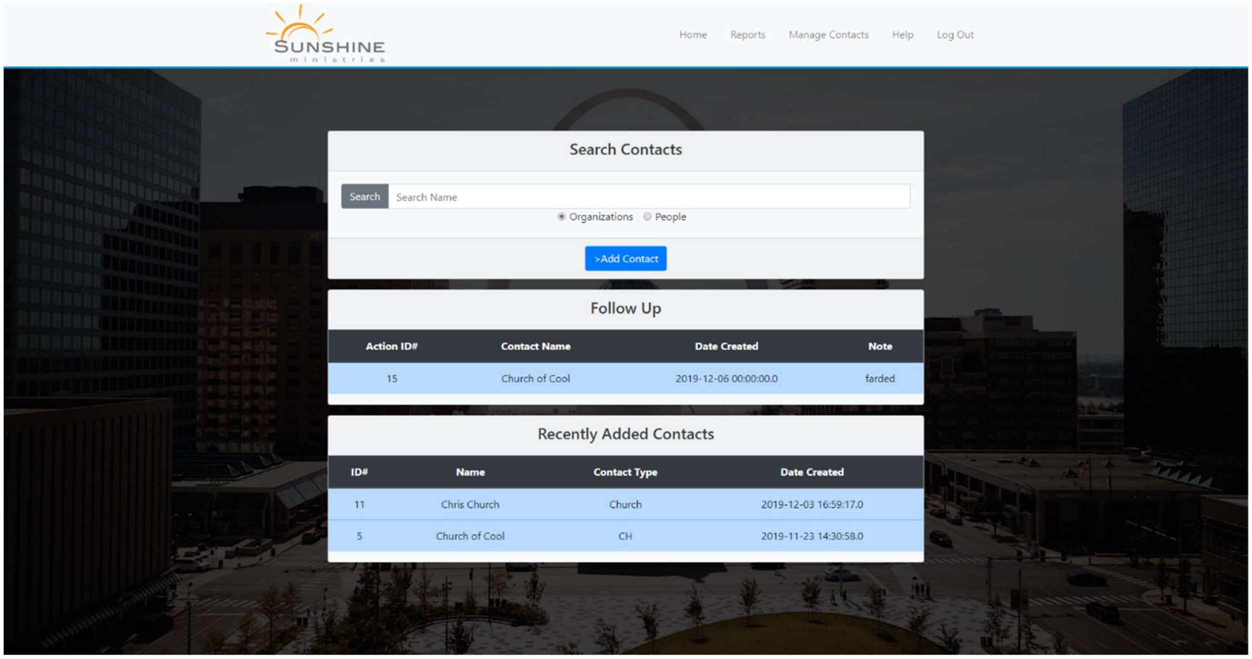

Figure 2: Home Page

2.2.1 Adding or Searching a Contact from the Home Page

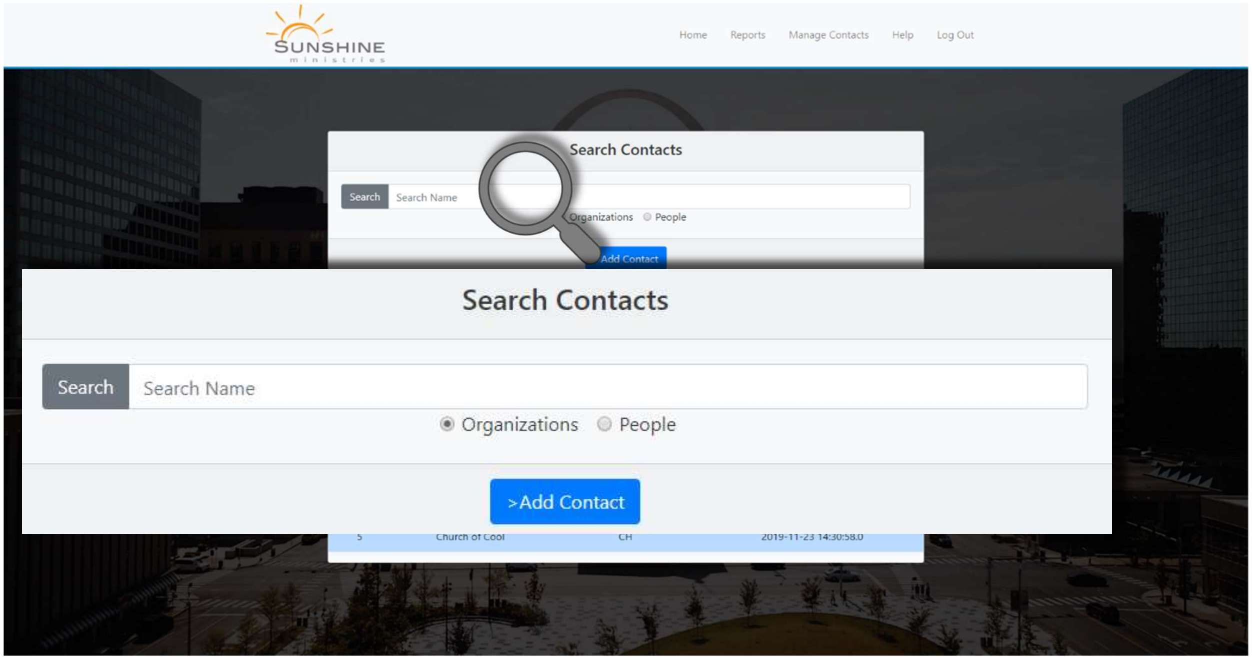

Figure 3: Contacts on the Home Page

To Add a New Contact: Click the "Add Contact" button and follow the instructions in **Section 2.3 – Managing Contacts.**

2.2.2 Managing Follow Up Actions on the Home Page

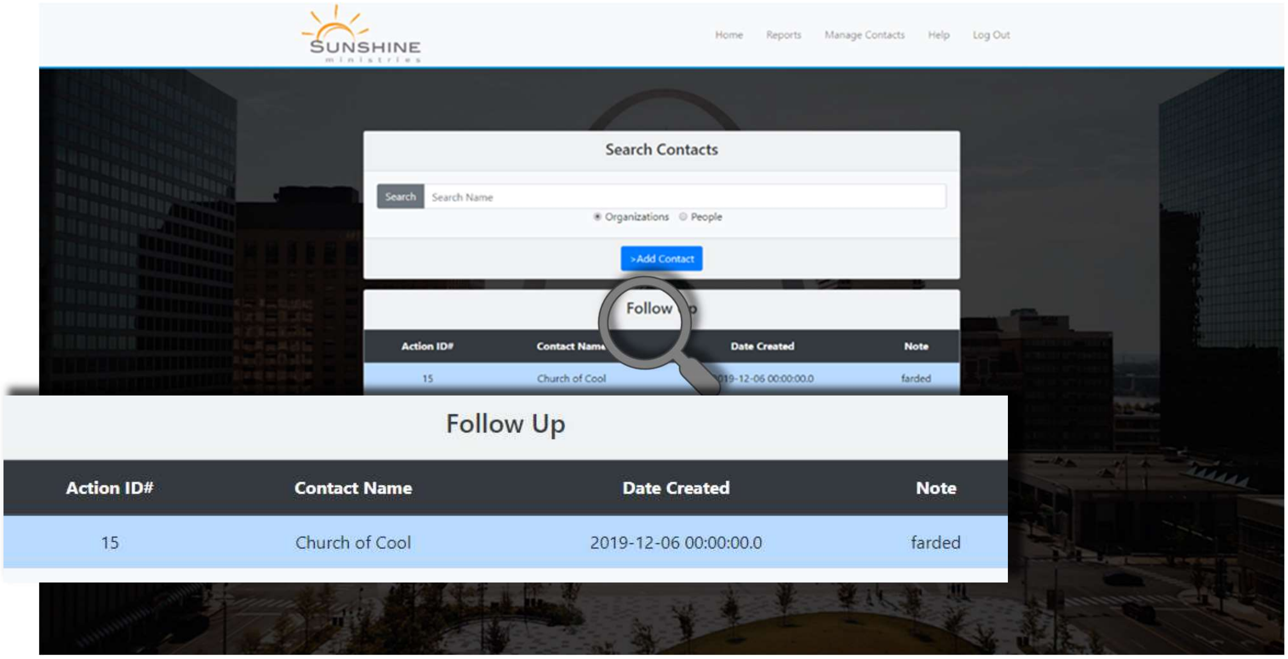

Figure 4: Follow Up Actions on Home Page

Follow Up Actions can be viewed from the Home Page. To view or edit this Action, simply click anywhere on the Action. For instructions on how to edit Actions, see **Section 2.4 – Managing Actions.**

2.2.3 Managing Recent Contacts from the Home Page

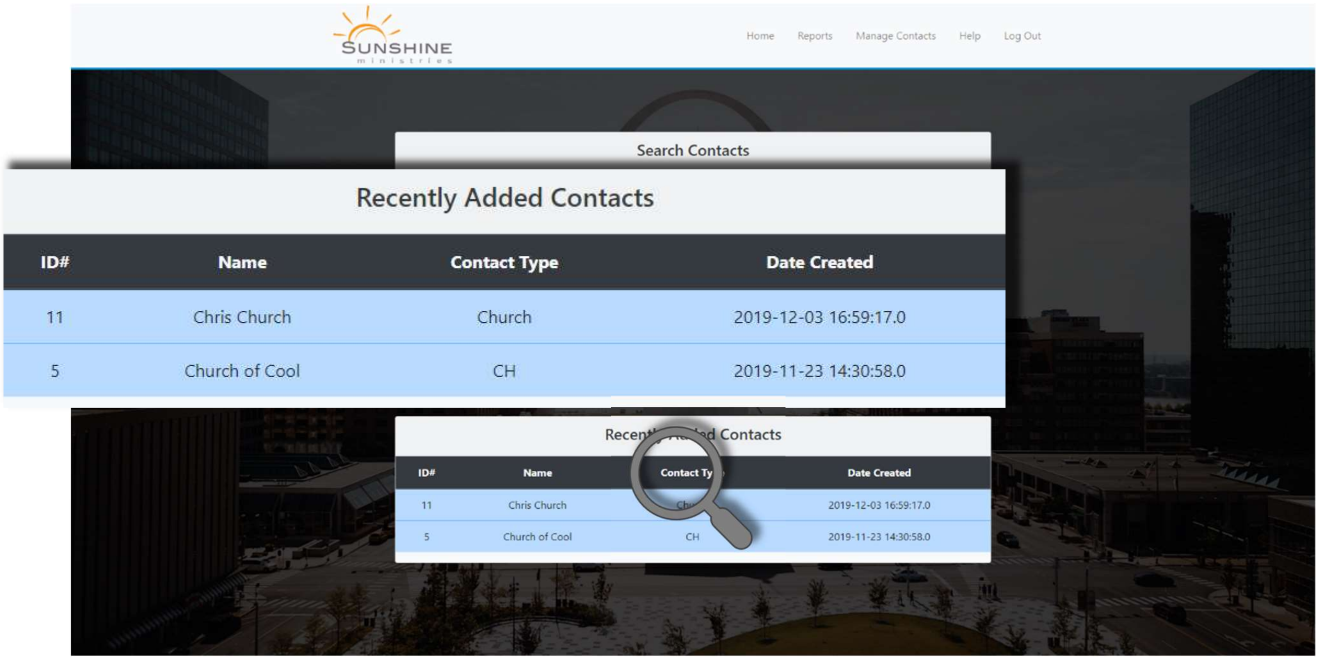

Figure 5: Recently Added Contacts on Home Page

The Home Page will display the Contacts that have been most recently added to the Sunshine Ministries Contacts Database by you or other users. To view one of the Contacts, simply click anywhere on the Contact card which will allow the user to edit the Contact. For instruction on editing Contacts, see **Section 2.3 – Managing Contacts.**

2.3 Managing Contacts

Clicking on the “Manage Contacts” link will take the user to the screen below where they can search and edit Contacts, add Actions, and view a map of Contacts’ addresses.

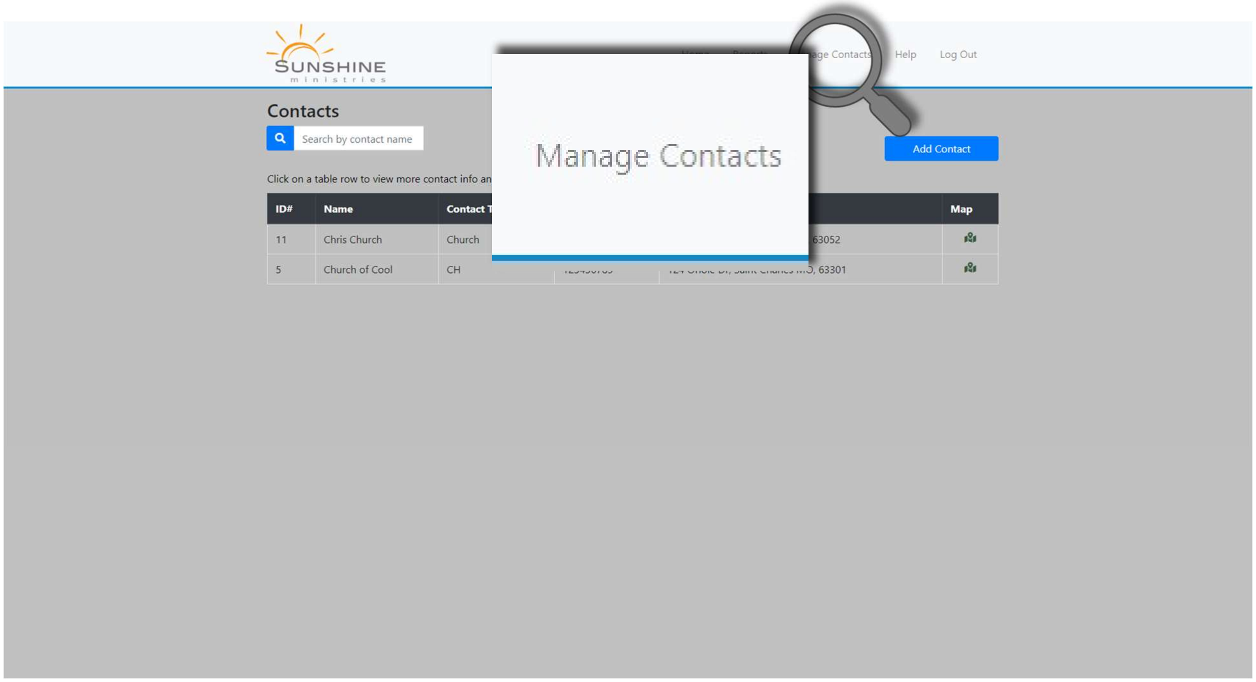

Figure 6: Managing Contacts

2.3.1 Searching for Contacts

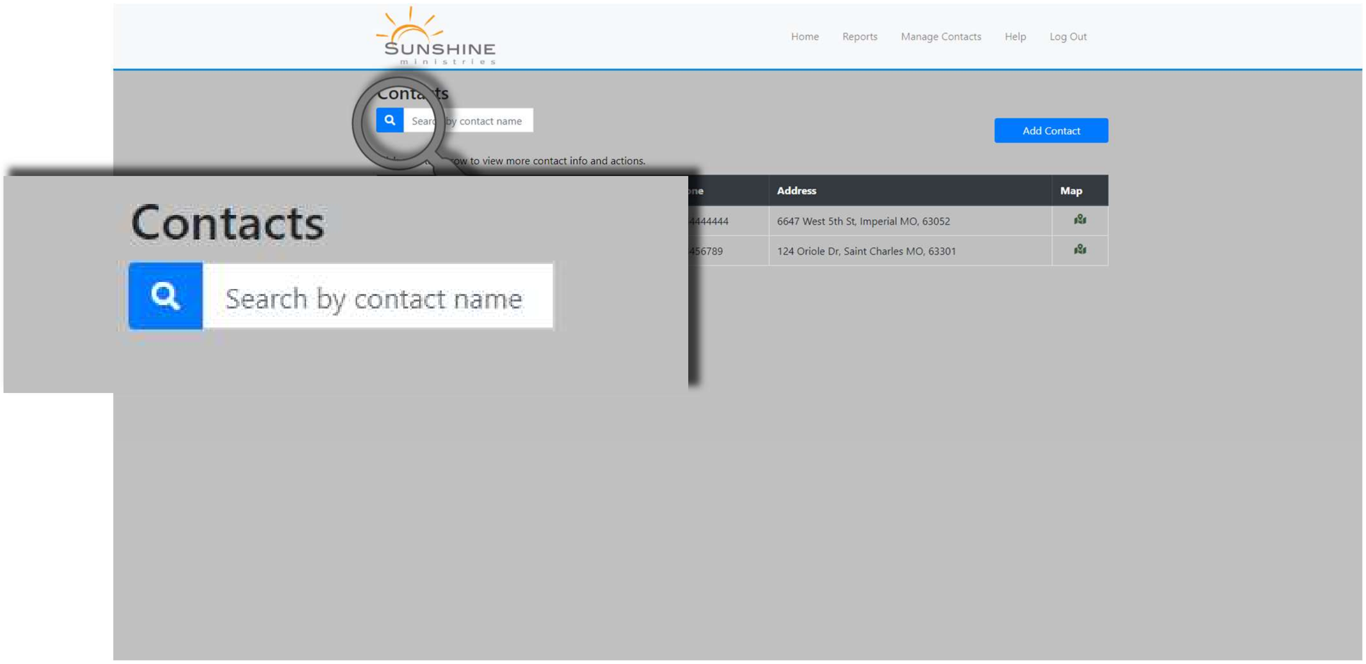

Figure 7: Searching for Contacts

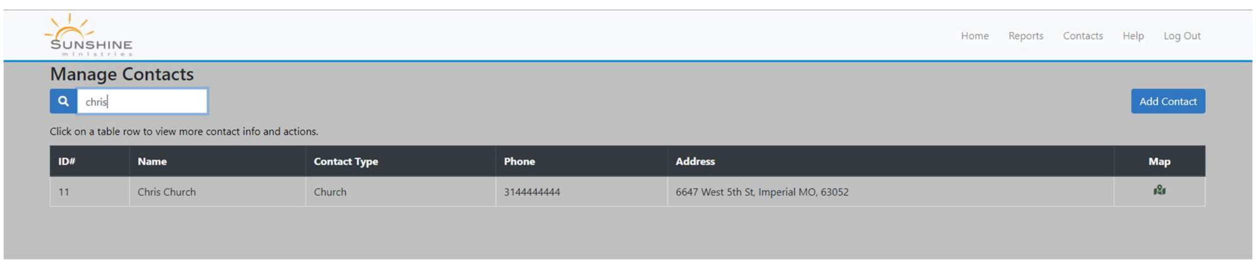

Figure 8: Search Result Example

To Search Contacts: Click into the Search box and type in your search parameters; this can be a Contact's name, alias, or ID#. A table, such as the one seen above, will list Contacts associated with your search. You can view or edit the Contact by clicking anywhere in their table row. For more information on Editing Contacts, see Section **2.3.3 – Viewing/Editing Contacts**.

2.3.2 Adding Contacts

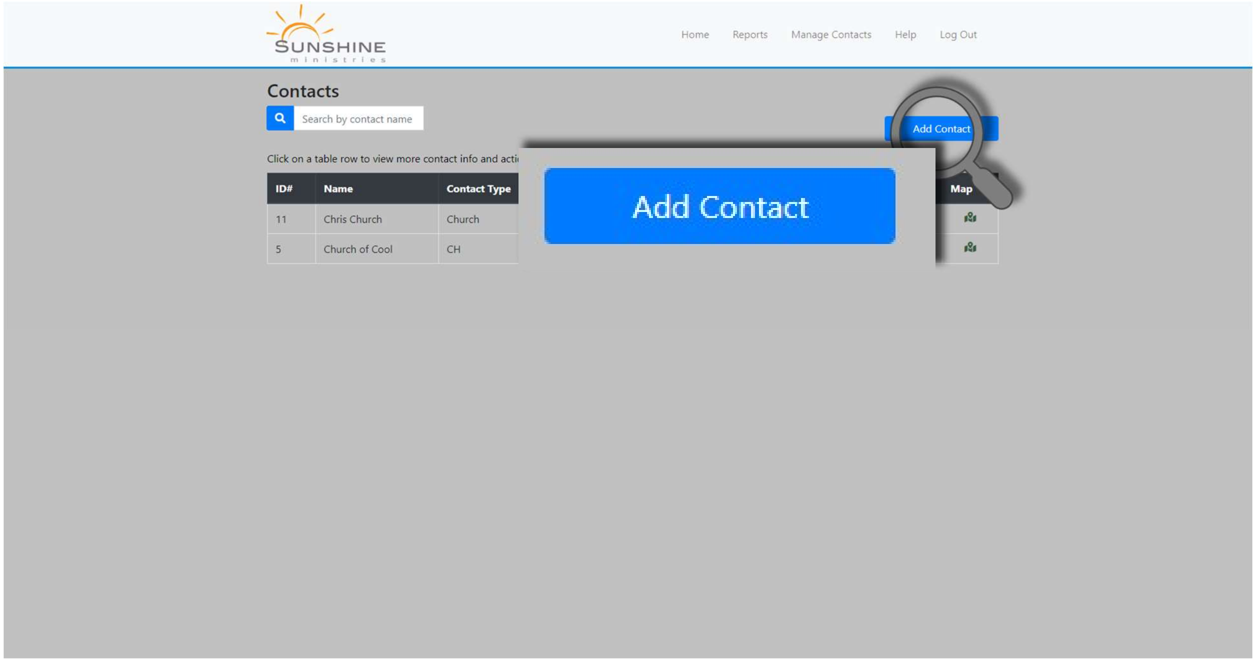

Figure 9: Adding Contacts

To Add a Contact:

1. Click the "Add Contact" button as seen above. A pop-up, seen on the next page, will appear.

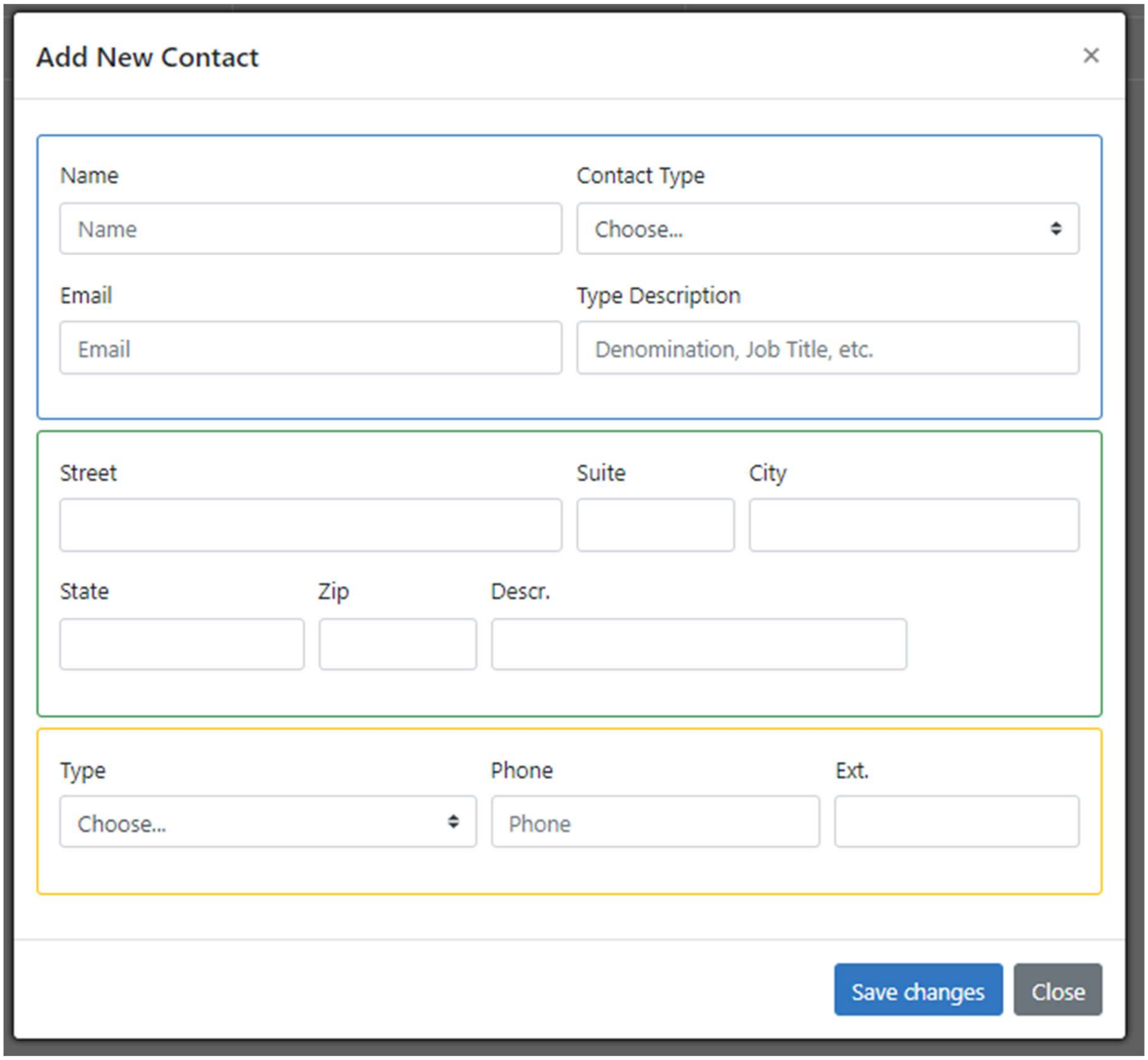

Figure 10: Add Contact Form

2. Enter the Contact's basic information into the **blue** section. Click on the Select box under "Contact Type" to select what kind of contact, such as a Church or School, this Contact is.
3. Enter the Contact's address into the **green** box on the right side of the page. Hit "Save" after entering the address.
    a. To create another address, click the "New" button inside of the **green** box on the left side of the screen. Enter the address information into the **green** box on the right.
    b. To sort through addresses, click into the Select box inside of the **green** box on the left of the screen.
    c. To delete an address, first Select it, then hit "Remove."
4. Enter the Contact's phone number into the text box inside of the **yellow** box on the right side of the screen. Click "Update" when finished.

   a. To add another phone number, select the “Add Phone” button inside of the **yellow** box on the left of the screen. Enter the phone number into the text box on the right.
   b. To sort through phone numbers, click into the Select box on the left **yellow** box.
   c. To delete a phone number, first Select it, then hit the “Remove” button on the right **yellow** box.
5. When all of the Contact’s information has been entered, click “Save Changes.”

2.3.3 Viewing/Editing Contacts

To Edit a Contact: You must first search for and Select the Contact. For instruction on how to find Contacts, see **Section 2.3.1 – Searching for Contacts.** Selecting the Contact will create the pop-up seen below.

To Edit Basic Contact Information: Enter the information as you would if you were creating a new Contact for the first three sections. For instruction on adding Contacts, see **Section 2.3.2 – Adding Contacts.**

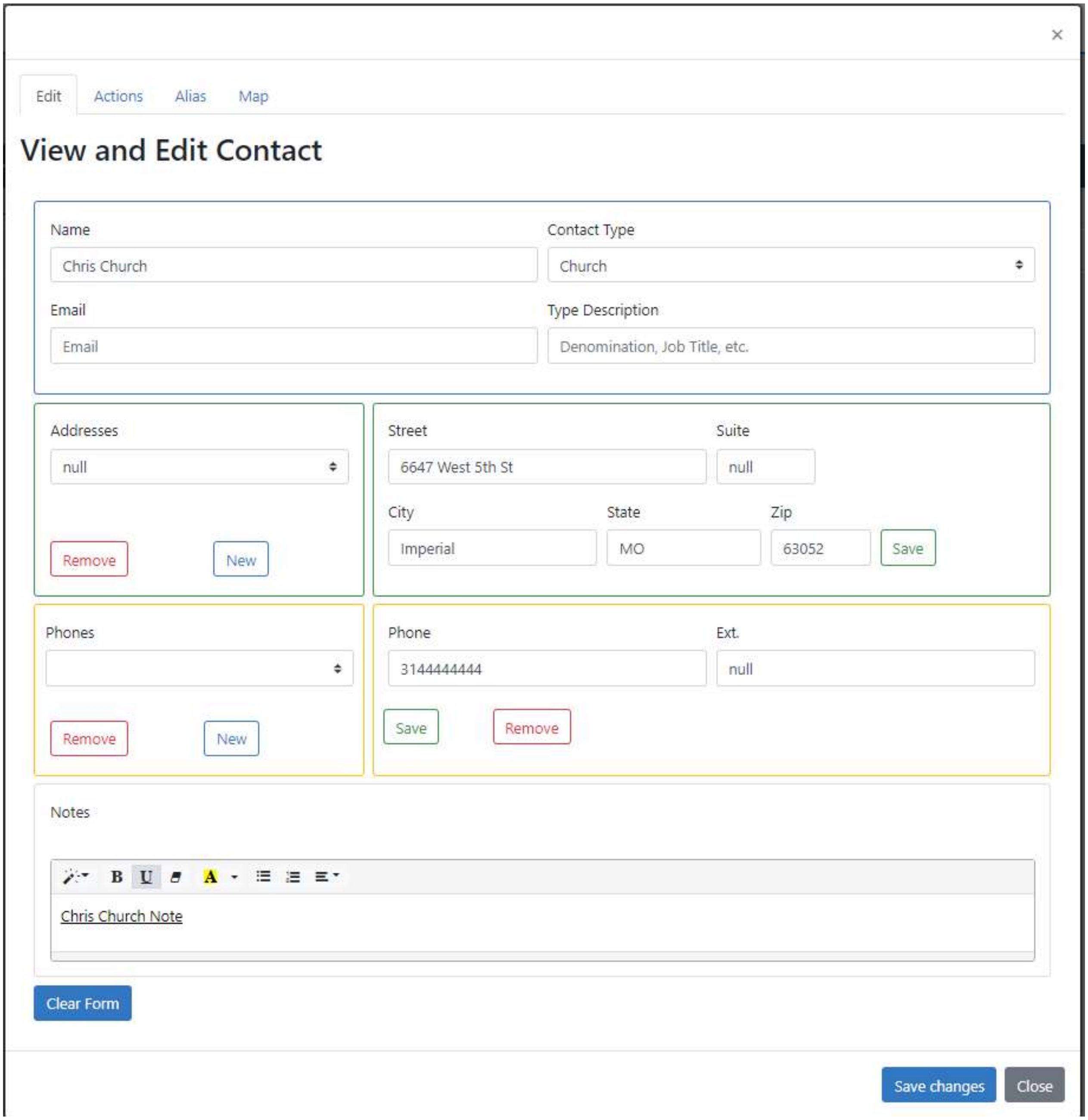

Figure 11: Editing an Action

To Add Notes: Type Contact notes into the textbox at the bottom of the View and Edit Contact pop-up. Notes can be edited with the formatting options (such as bold, underline, and strikethrough) at the top of the textbox.

To Clear Changes: click “Clear Form.” This will delete all information typed into the form.

To Save Changes: When all the Contact’s information has been entered, click “Save Changes.”

To Add/Edit Actions: See **Section 2.4 – Managing Actions.**

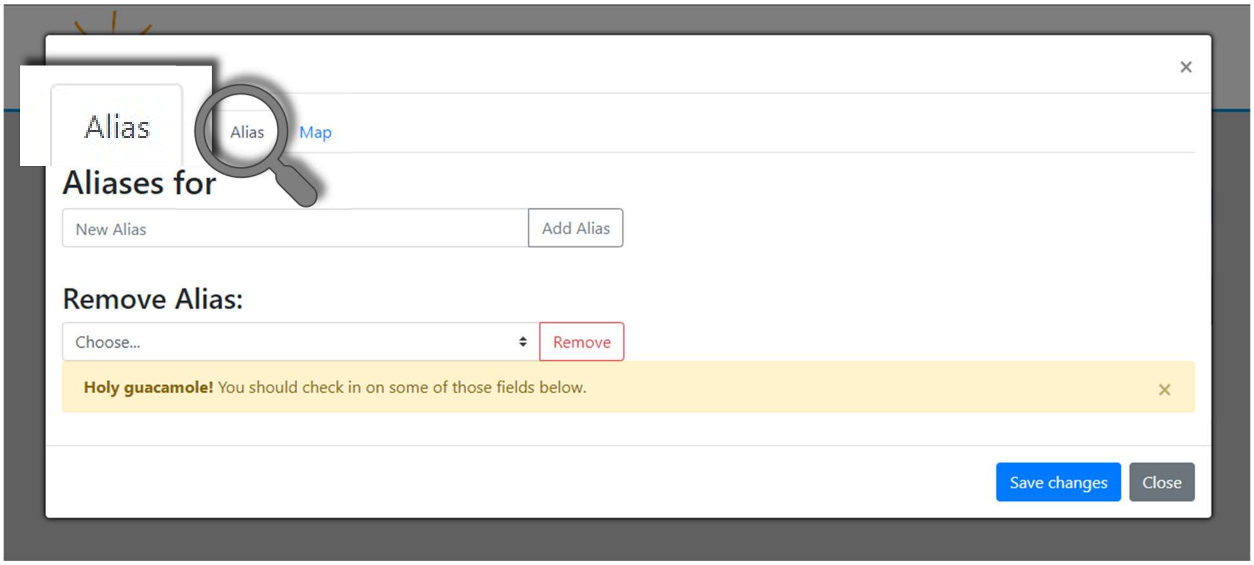

Figure 12: Aliases

To Add/Edit Aliases:

1. Click on the "Aliases" tab on the top of the pop-up.
2. Enter a Contact's Alias, a nickname that you would like to be able to search for them by, into the text box that says, "New Alias." Click the "Add Alias" button.
    a. To remove an Alias, click into the Select box under "Remove Alias" and Select the desired Alias, then click "Remove."

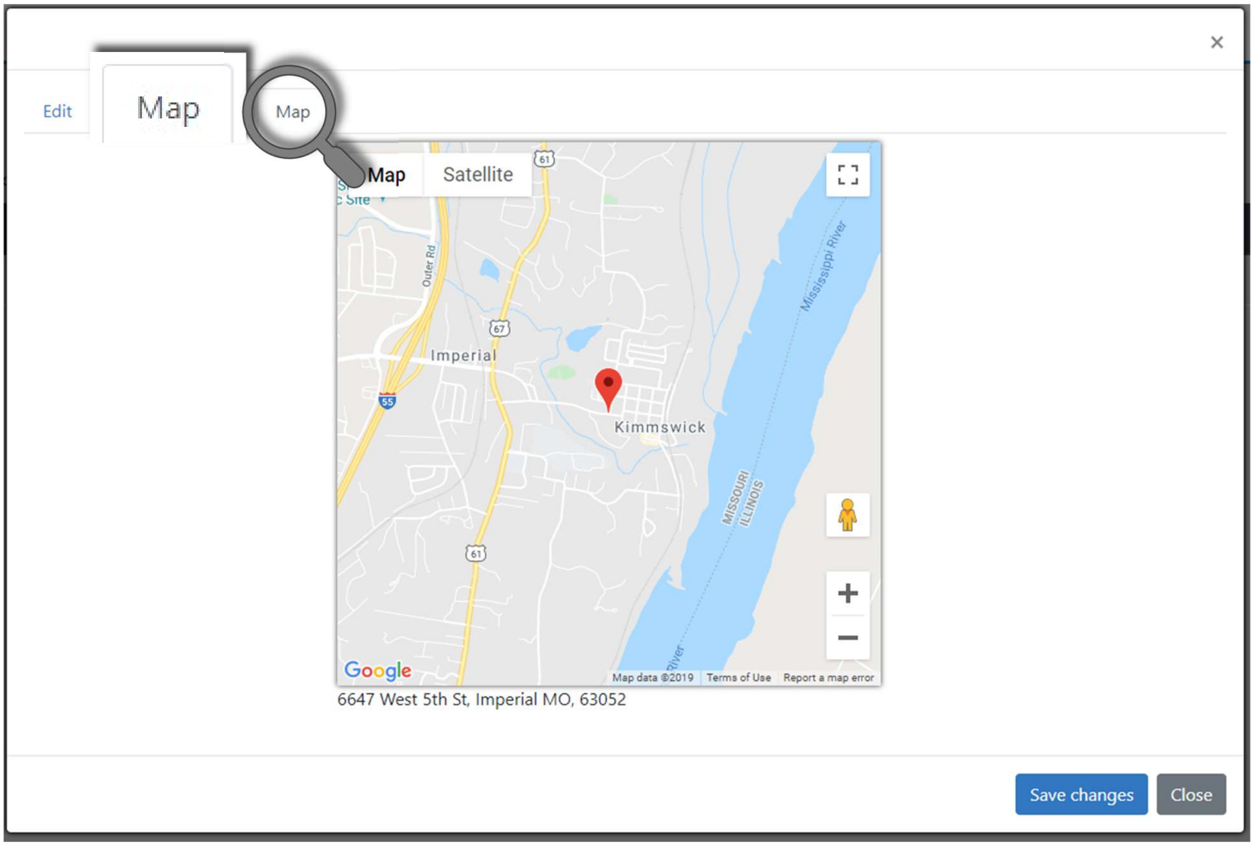

Figure 13: Contact Map

To View the Contact's Map: Click on the "Map" tab at the top of the pop-up to view an interactive Google Maps map of the Contact's address.

2.4 Managing Actions

"Actions" allow you to keep track of information about and activities performed with a Contact. Actions are found on the "Actions" tab of the View and Edit Contact popup. To view this pop-up a Contact must first be Selected. For information on searching and selecting a contact, see **Section 2.3.1 – Searching for Contacts.**

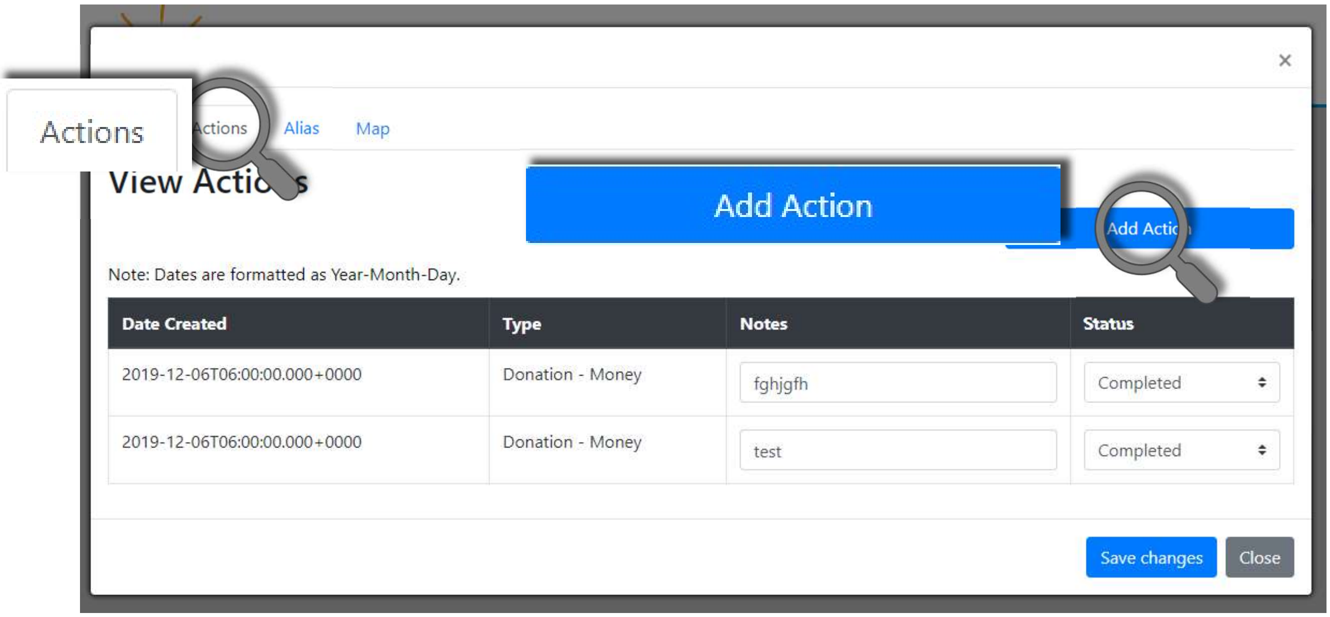

Figure 14: Actions Tab

To add an Action:

1. Click the "Add Action" button seen above. This is create the popup below.
2. Click into the Select box labeled "Action Type" and select what type of Action is being/has been performed.
3. Enter any notes about the Action into the text box labeled "Notes."
4. Click into the Select box labeled "Status" and select either "Completed" or "In Progress" based on the Actions current status. Follow Up Actions will display on the Home Page.

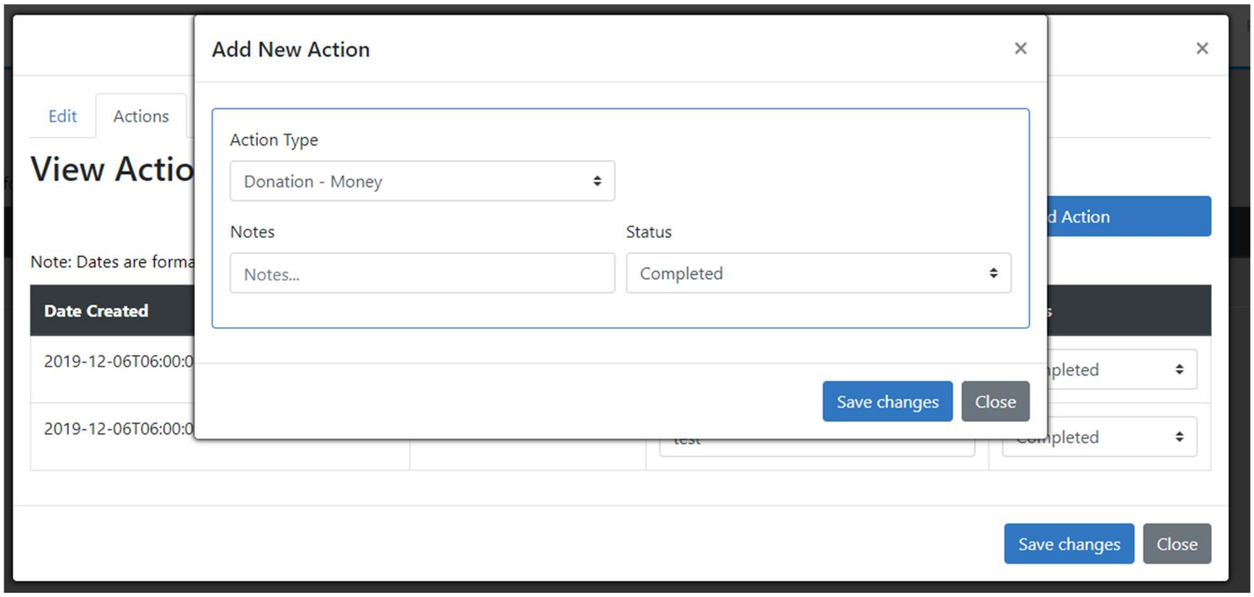

Figure 15: Adding an Action

To Edit an Action: Type directly into the Notes text box on the Action's table row to add to or edit the Action's notes. Click on the Select box under "Status" to change the Action's status.

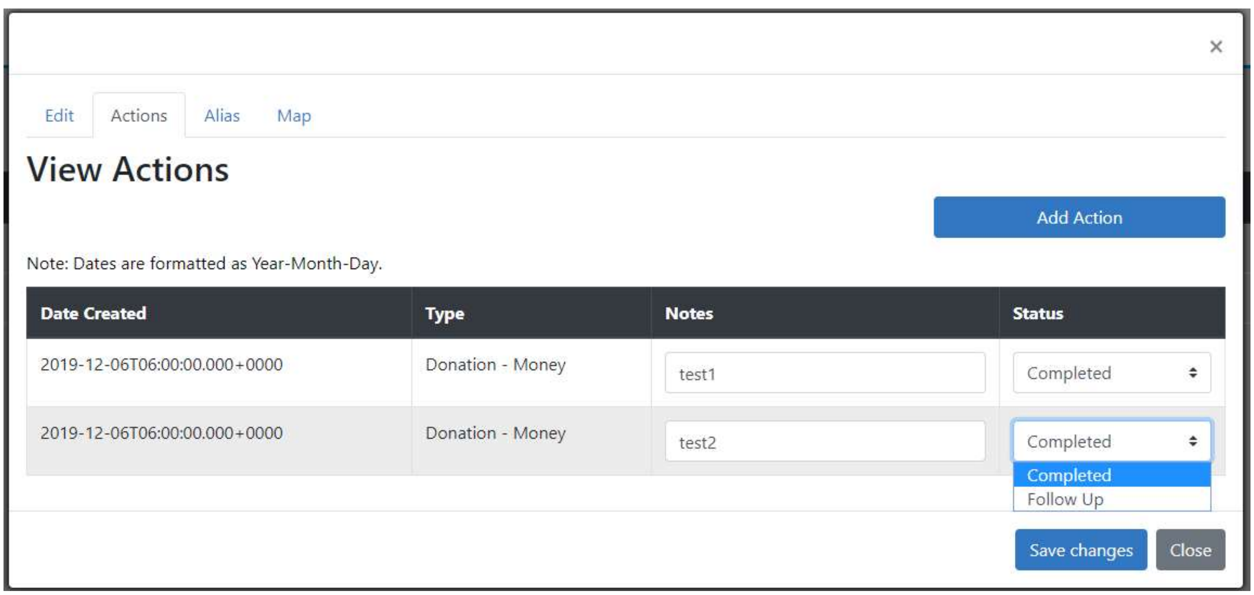

Figure 16: Editing an Action