churchinsight

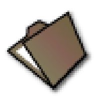
Contact Management

Maintaining up to date contact information for the people in your church can be a time consuming task – especially when the church printed address book is in production! Your churchinsight web site can drastically reduce this workload by providing facilities for each member to update their own contact information through the **my profile** section of the web site, and at the same time access other members information through the online **address book**. In the web office you can use this information to send mailings to different groups of people using email or post – whichever is the most appropriate.

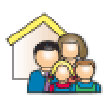
This quick start guide explains the basic concepts of storing contact information and some of the tasks making up to the role of "membership manager".

Contact database folders

Within your church you will undoubtedly have contact information for a number of different groups of people – people who have attended courses, people who are members of the church, people associated with a church charitable trust. This contact information can all be stored in your web site using a number of different databases. The following contact database folders can all be found in the web office **navigation pane**:



Mailing Lists – mailing lists are independent contact databases which are designed for use with the **mail office**. Although you can add people from the church to these lists they are primarily intended for people who have very little contact with the church e.g. alpha course attendees, visitor card records etc.



Church home – the primary contact database for your church. Every person belonging to a **group folder** will always be registered in the **church home** database.

Independent group – although independent groups appear in the group structure under **church home** they have an entirely separate contact database. Independent groups are useful for maintaining contact information for groups which involve people from outside the church e.g. 'mothers and toddlers' and the church football team.

The contact information for a person may be copied from one database to another if required; for example, when a member of the football team begins attending the church you can copy that record into the **church home** database. Any subsequent updates to the contact information will now update the record in both databases. Removing the record from one database **will not** remove them from the other.

Contact management and permissions

The reliability of the information stored in your contact databases is critical – for this reason the ability to edit contact information is restricted to a relatively small number of people. Whilst every **group folder** has a **members** tab to display the names of people belonging to the group, it is only possible to edit this information in one of the contact database folders. In order to edit the information you must also have both of the following permissions:

➲ **Membership manager –** this permission is required in order to be able to access the **members** view.

- **Edit members' details** – this permission enables you to click on one of the names in the **members** view to display contact information which can be edited. If you do not have this permission then clicking on a name will only allow you to display "read-only" contact information identical to that shown in a **group folder**.

Editing existing contact information.

You can display contact information for one of the people in the database as follows:

- If you haven't logged into the web site already, do so now. Click the **Login** link at the top of the home page and enter the login name and password as supplied.
- Once you have successfully logged in click the **web office** link at the top of the home page. The Web Office will be displayed shortly afterwards.
- Select a **contact database folder** – a mailing list folder, church home, or an independent group.
- Select the **members** tab to display the current list of people in this database.
- Click on one of the names to display the contact record.

Contact information is grouped into **individual details** and **family details**. By default the individual details are shown as follows:

Name:	Title, first name and surname. You should only use the title option if you wish to automatically include this in any correspondence.
Contact details:	Correspondence information including login name, email address', phone numbers, and personal web pages. The **preferred correspondence method** setting will set how to communicate with this member when using the **mail office** feature and sending out rotas. If this person does not live at the family address use this area to enter an alternative address.
Status:	This area indicates current membership status settings and is not available to the member through the **my profile** area. Web site login may be enabled or disabled using the task link at the bottom of the window; set the **church membership** setting to match their current membership status and, if necessary, select an involvement level. Whether or not the person will feature in the **address book** area of the web site is indicated underneath; this depends on the **address book policy** configured by your church. If this person does not appear in the address book click the why? link to display the criteria they must fulfil to be included. The selected settings in this area will also change the colour coding in the **members** view to reflect their involvement in the church. Use the **record details** section to see whether this account is still actively used.
Personal details	Use this area to store the date of birth, gender, the description they submitted when applying for an account, a personal photo, and their current privacy settings.

> **Note**: In addition to the fields above the **Other Information** area contains fields which have been added to the database using the **global fields** feature. For more information see the quick start guide called "Group notes and global fields".

At the top of the record any other members of the family will be listed alongside the family name as illustrated below:

John Smith The Smith Family | Mary

Click on the "**The** *familyname* **family**" link to display the **family details** view (at this stage any changes you have made to the individual details will be saved); information shown is as follows:

Name:	Default surname for each member of the family.
Address:	Address where the majority of family members live.
Phone:	Family home phone number.
Photo:	Use this area to store a photo of the family.

Once you have finished editing the contact information in this record click the **save and exit** button to close the window.

Adding new records to the database

In addition to the normal registration process you can add new records to the database manually as follows:

- Select a **contact database folder** – a mailing list folder, church home, or an independent group.
- Select the **members** tab to display the current list of people in this database.
- Click on the **Create a new record in the** *database folder* **database** task. The "Create a new record" wizard will be displayed in a new window shortly afterwards.
- **Step 1 – enter name details** – enter a first name and surname for the person you are adding. The **title** field should only be completed if you wish to use this entry in all correspondence. Click the **next** button to continue.
- **Step 2 – enter family details** – if the person you are adding is a member of an existing family in the database click the **find family** button to locate them. Otherwise enter the family address and phone number. Click the **next** button to continue.
- **Step 3 – enter individual details** – set current membership status and whether this person should be able to log into the web site. Enter an email address, personal web site, phone numbers, date of birth and gender. Finally select a privacy setting to restrict the availability of this contact information in the online **address book**, and set how you would like to communicate with this person in mailings. If this person does not live at the family address enter an alternative address by checking the appropriate option. Click the **next** button to continue.
- **Step 4 – confirm details** – a summary of the information you have entered will be displayed including their web site login permissions. If you have set the web site login option to **enabled** they will automatically be sent a login name and password by email if one is supplied. Click the **finish** button to confirm that this information is correct and proceed to create the new record. Confirmation of the login name and password will be displayed shortly afterwards if appropriate.

- Click the **continue** button to close the window.

> **Note**: if you are adding records to your database for the first time you may wish to use the "import records from a file" wizard to create a large number of entries in one automated process.

Processing applications

Many of the new additions to your church database will come in the form of **applications** - created when the **registration form** is completed on your church web site. When a new application is awaiting processing a symbol will appear next to the appropriate database folder.

> **Note:** the **my involvement** section of the web site allows existing members to express an interest in joining other groups in the church. The symbol next to a **group folder** indicates outstanding applications to join this group. This process does not affect web site access or change contact information (although once they have been approved they will be able to access content restricted to this group).

To process this application:

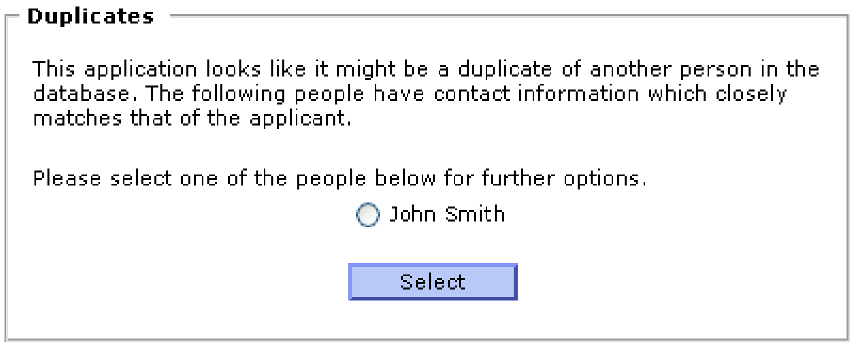
- Select the **contact database folder** where the new application is located – church home, or an independent group.
- Select the **members** tab to display the people in this database.
- At the top of the **members** view new applications appear in the **applicants** box.
- Click on the applicant name to display the contact record.

  Once you have reviewed the details submitted by the applicant you can process it in one of four ways:

  - **Approve the application** – click the **Give this person access to the web site** task link. At this stage you should select an appropriate **church membership** setting and **involvement** level – these settings will have an effect on whether this person appears in the online **address book** (depending on your site address book policy). The person will be added to the relevant database.
  - **Request more information** – if you are not sure who this person is, or the details supplied are insufficient you can contact the applicant for more information. Click the **Contact the applicant for more information** task link at the bottom of the window and enter an email as appropriate.
  - **Deny access to the web site but retain the contact information** – if it is not appropriate to grant access to the web site to this person you can still keep the contact information as a record in your database. Click the appropriate task at the bottom of the window to add this person to your database – you should also send an email to the applicant to give them the opportunity to have their details removed from the database.
  - **Delete the application –** if an application has been outstanding for some time you can delete it by selecting the **Delete this application** task link from the bottom of the window. All the details submitted in the registration will be lost.

Duplicate records

If the details submitted in the application are similar to an existing record a **duplicates** box may be displayed at the top of the applicant details:



If this application is a duplicate record highlight the appropriate name in the duplicates box and click **select**. You will then be given the opportunity to update the existing contact information with the new details supplied before removing the application.

Additional information

When a person is selected from the **members** view the contact record also provides access to a number of other tabs with information on the involvement this person has within your church:

Rotas – see a list of rota duties which this person is participating in. For more information on rotas see the quick start guide called “web office - rotas”

Involvement – see which groups this person is a member of.

Mail History – see a list of mailings which you have access to that have been sent to this person.

Group Notes – additional fields in the contact database which are specific to one or more groups. For more information on this feature see the quick start guide called “web office - group notes and global fields”.