

ADULT DATA

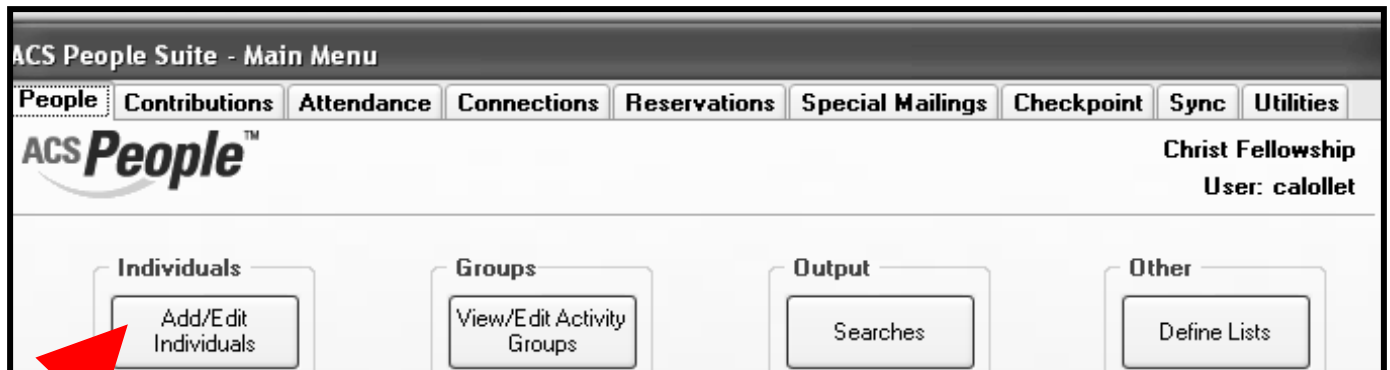
Training Guide

This guide will address how to enter a new individual record or edit a new individual record by reviewing each of the main tabs in an ACS record:

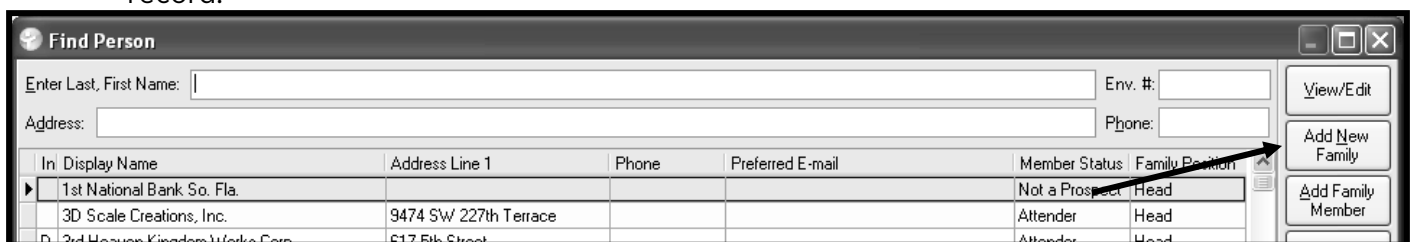
- Search the Database Page 3
- Profile Tab Page 4
- Additional Fields Tab Page 5
- Family Tab Page 6
- Address Tab Page 7
- Contact Information Tab Page 8
- Comments Tab Page 9
- Connections Tab Page 10-11

SEARCH THE DATABASE

- Search for the individual after clicking on the “Add/Edit Individuals” button in People Suite. (image shown below)
- ALWAYS search the database using these three methods BEFORE adding a new individual to the database to minimize duplicate records within the database.
 1. Name
 - Type last name (comma) first initial
 - Type last name
 - Type the first three letters of the last name
 - Type (comma) first name to see all the people in our database with that first name.
 2. Address
 - Type ONLY the first number part of the address.
 - For example if I were looking for 9474 SW 227th Terrace in the database, I would type “9474” in the address search line.
 - DO NOT TYPE THE WHOLE ADDRESS when searching by address.
 3. Phone Number
 - Always use dashes and an area code when searching by phone number or the database will not recognize the format. (XXX-XXX-XXXX)



- If you cannot find an individual in the database, click the “Add New Family” button.
- If you found the individual in the database, click the “View/Edit” button to view their record. Check the information to ensure everything is correct on all the tabs in their ACS record.



PROFILE TAB (OR 1ST SCREEN AFTER CLICKING THE ADD A NEW FAMILY BUTTON)

→ Fill in the circled fields below.

→ If you do not have information for a field, leave it blank.

Add New Family

Name Information

Last Name: **Fellows** Title: []
First Name: **Christopher** Suffix: **Jr.**
Middle: **Sam** Goes By: **Chris**

Active Address

Company []
Address 1: **11551 SW 168th Street Apt 506**
Address 2: []
ZIP Code: **33157** []
City: []
State: **FL**
Home Phone: **305-238-1818** Listed Unlisted

Personal Information

Date of Birth: **10/8/2001**
Marital Status: **Single**
Member Status: **Guest**
Joined How: []
Date Joined: []
Gender: **Male**
Record Type: **Prospect**
Family Position: **Head**
Newsletter: **Family**
Deliver by: **E-mail**
SSN: []

Contribution Information

CB Record Type: **None**
Envelope Number: []

E-mail Address

cfellows@cfmiami.org

CLICK HERE WHEN DONE

Additional Fields

YOU MUST CHANGE THIS FIELD TO "HEAD" or "SPOUSE" FOR EACH ADULT DEPENDING ON THEIR MARITAL STATUS. THIS IS THE ONLY TIME YOU CAN CHANGE THIS WITHOUT CONTACTING THE DATA MANAGER TO CHANGE IT FOR YOU.

* You will not use "Other" or "Child" for adults.

Head = A single man or woman. A man who is married.

Spouse = A woman who is married to the Head record.

Other = A child who is a relative or friend of the Head record.

Child = A child of the Head or Spouse record.

ADDITIONAL FIELDS TAB (OR 2ND SCREEN AFTER CLICKING THE ADD A NEW FAMILY BUTTON)

→ Fill in the circled fields below.

The screenshot shows a software window titled "Add New Family" with a close button in the top right corner. The form is organized into several sections:

- Name Information:** Includes fields for Last Name, First Name, Middle, Title, Suffix, and Goes By.
- Lists:** A vertical column of dropdown menus including Ethnic Background, Religious Background, Occupation (highlighted with a red circle and containing the text "Accountant"), Child Dedication, Not Defined, Restrictions, Language Usage, First Friends, Not Defined, Send Envelopes, Reason Inactive, and Blood Type.
- Fields:** Includes Un-authorized P/U, Allergies, First Visit, School, and Date Inactivated.
- Dates:** Includes Date Baptized, Marriage Date, Salvation Date, Deceased Date, and 1st Time Visit (highlighted with a red circle and containing the date "8/1/11").

At the bottom right, a red-bordered box contains the text "CLICK HERE WHEN DONE" with a black arrow pointing down to a button labeled "Family Fields". At the bottom of the window, there are four buttons: "Save/Add Another Family", "Save/Add Family Member", "Save", and "Cancel".

FAMILY TAB (OR 3RD SCREEN AFTER CLICKING THE ADD A NEW FAMILY BUTTON)

→ Fill in the circled fields below.

The screenshot shows a web form titled "Add New Family" with a close button in the top right corner. The form is divided into two main sections: "Name Information" and "Family Fields".

Name Information:

- Last Name:
- First Name:
- Middle:
- Title:
- Suffix:
- Goes By:

Family Fields:

- Campus Attended: (This field is circled in red in the original image.)
- Home E-Mail:
- Not Defined:
- Previous Church Attend:
- Religious Bkgd:
- Faith:

At the bottom right of the form is a button labeled "Profile Fields".

At the bottom of the form are three buttons: "Save/Add Another Family", "Save/Add Family Member", and "Save" (which is circled in red). A "Cancel" button is also present to the right of the "Save" button.

Annotations:

- A jagged white starburst shape is overlaid on the form, containing the text: "The Campus Attended field is super important! If you change it for one family member, you have changed it for all!".
- A red-bordered box contains the text: "CLICK HERE YOU ARE DONE ENTERING INFORMATION". A large black arrow points from this box down to the "Save" button.

ADDRESS TAB

→ In this tab, you can edit an individual's address or add a home phone number.

View/Edit Individual

Name Information

Last Name: Test Title: [v]
First Name: Tato Suffix: [v] Inactive
Middle: [] Goes By: []

Profile Family Additional Fields **Addresses** Contact Information Comments Groups Pictures Label Names Connections Safeguard Documents

Active Addresses

Primary: Home Mailing: Home Statement: Home

Family Addresses

Type	Address	City / State	ZIP Code	Phone #	Listed
Home	12454 SW 168th Street	Miami, FL	33157	305-219-4497	L

This is where the home phone number is located.

Individual Addresses

Type	Address	City / State	ZIP Code	Phone #	Listed
<No data to display>					

Buttons: Edit, Close, Add, Edit, Delete, Map Address, Dial Phone, Print

CONTACT INFORMATION TAB

- This is where we record cell/work phone numbers and home/work email addresses.
- All email addresses should first be listed as “Home.”
- Make sure that at least one email is checked as their preferred.
- Make sure at least one phone number is checked as their preferred phone number.

View/Edit Individual

Name Information
Last Name: Test Title: [v]
First Name: Tato Suffix: [v] Inactive
Middle: Goes By: [v]

Profile Family Additional Fields Addresses **Contact Information** Comments Groups Pictures Label Names Connections Safeguard Document Library

Preferred Contact Method
 Phone Call E-mail Text Message

Phones
Preferred Phone: 305-219-4497

Description	Number	Extension	Listed	Text Enabled
Cell	305-300-9617		Y	N
Home [Address]	305-219-4497		Y	N
Work	305-238-1818		Y	N

E-mail Addresses
Preferred E-mail: data@cfmiami.org View Access ACS Logins

Description	E-mail Address	Listed
Home	data@cfmiami.org	Y

Social Media
Description

If an adult only lists their cell phone number, please put it in the Home [Address] phone number field and in the Cell phone number field.
***Remember, you add Home [Address] phone numbers in the “Address” tab.**

COMMENTS TAB

→ This is where we record individual prayer requests. DO NOT USE FAMILY COMMENTS.

View/Edit Individual

Name Information

Last Name: Test Title: [v]
First Name: Tato Suffix: [v] Inactive
Middle: Goes By: [v]

Profile Family Additional Fields Addresses Contact Information **Comments** Groups Pictures Label Names Connections Safeguard Document Library

~~Family Comments~~

Date	Type	Comment
<No data to display>		

Individual Comments

Date	Type	Comment
▶ 9/8/2011	Prayer Requests	This is a test prayer request!

Please only put meaningful, sincere, prayer requests.

Add Edit Delete Print

CONNECTIONS TAB

- This is where we record all First Time Guest information, Signups and Decisions.
 - **Step 1:** Always select, “Individual” (see red arrow) because we enter decisions for individuals, not families.

The screenshot shows the 'View/Edit Individual' window. The 'Name Information' section includes fields for Last Name (Test), First Name (Tato), Middle, Title, Suffix, Goes By, and an Inactive checkbox. Below this is a tabbed interface with 'Individual' selected. The 'Contact Information' section has fields for Last Inward, Last Outward, Review Date, Prospect Source (set to 'Personal Invite'), and Assigned To. A red arrow points to the 'Individual' dropdown. A red callout bubble points to the 'Personal Invite' dropdown with the text: "Step 2: Select this dropdown to indicate how they heard about CF." Below this is a 'Contacts' table with columns: Past Due, Date, Type, Decision Cards, Comment, Complete, Classific., Responses, and buttons for Add, Edit, and Delete. A red callout bubble points to the 'Add' button with the text: "Step 3: Select the 'Add' button to add a 1st Time Guest Connection, Signup, or Decision." The table contains three rows of contact data.

Past Due	Date	Type	Decision Cards	Comment	Complete	Classific.	Responses	
Yes	3/1/2011	Phone Call Follow Up	1st Time Guest		No	Outward		Add
No	2/27/2011	Connection Card	1st Time Guest	C. Lollett	Yes	Inward	Not A Prospe	Edit
No	2/27/2011	Connection Card	Baptism - Beach (DEFAULT		No	Inward		Delete

- When you click “Add” the next screen pops up (on page 14).
 - Each signup or decision gets a new Connection. You will have to hit the Add button for each new connection.
 - Every First Time Guest gets a new Connection.

Continued on next page

Add / Edit Contacts [X] Complete

Details **Response**

Classification

Individual
 Inward
 Family
 Outward

Date: [v]

Type: [v]

Decision Cards: [v]

Comment: [text area]

Assigned Callers

Name	Phone
<No data to display>	

[Select Caller] [Delete Caller] [Select Team]

Add Another
 [Assign Template]
 [Ok]

Step 4:

- › **Date:** Make sure the date entered is the correct service date.
- › **Type:** Select the type of form that the data is coming from.
- › **Signup/Decision:** Every First Time Guest, Signup or Decision gets a new Connection with the correct Decision Card field selected.
- › **Responses Tab** (see image below): If an adult signs up for *ministry*, *missions*, or *small groups* click this tab to select which one they want to join.
- › **Comment:** Any general comments that could not be recorded in Decision Cards or Responses tab.

Add / Edit Contacts [X] Complete

Details **Responses**

Available Responses

- Arts and Communication
- Caring For Miami DT
- Caring For Miami Mobile
- Caring For Miami RD
- Caring For Miami Women's Ctr
- CF Counseling Center
- CF Kids
- CF Students
- Congregational Care
- Data Support
- Global Missions
- Guest Services
- Local Missions
- Media
- Not Sure (wants to volunteer)
- Operational Support
- Small Groups
- Worship

Checkmarks indicate responses that are currently assigned

Add Another
 [Assign Template]
 [Ok]