

CF KIDS

GUEST FORM

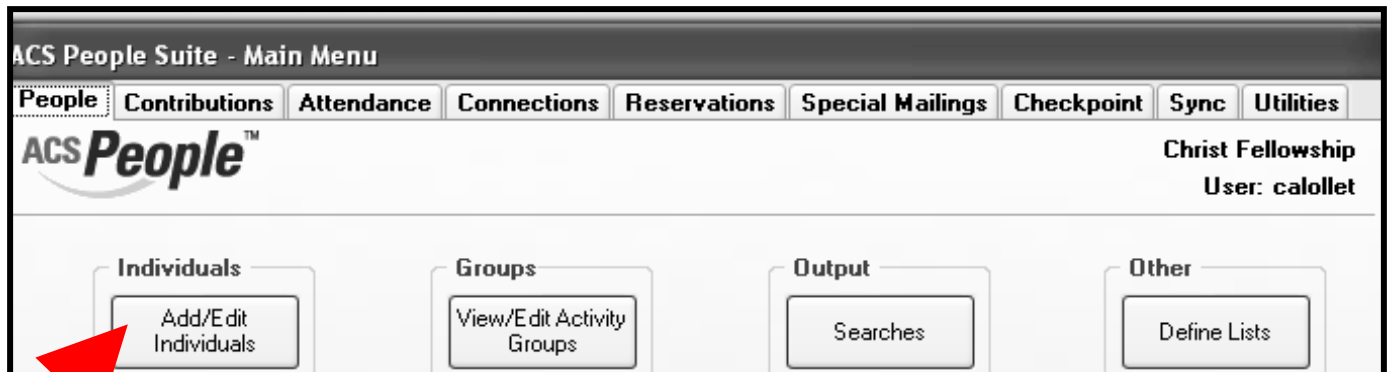
Training Guide

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:

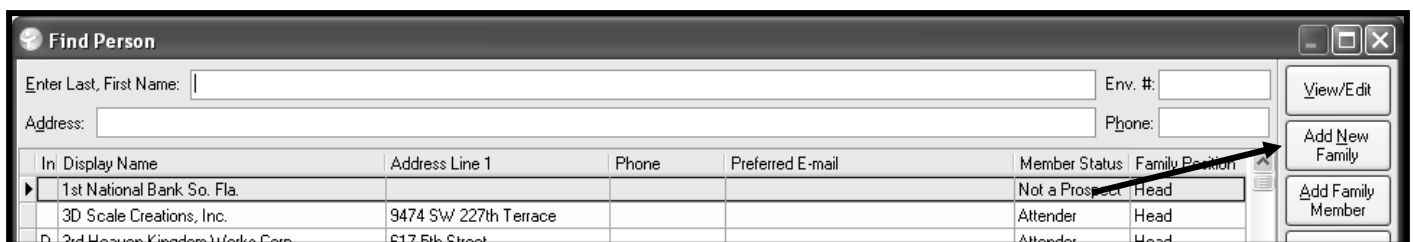
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SEARCH THE DATABASE

- 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)
- Search for mom, dad, and child before adding a new family.



- If you cannot find them in the database, click the “Add New Family” button.
- If you found them in the database, check their information to ensure everything is correct on all tabs in their 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

YOU MUST CHANGE THIS FIELD TO "CHILD" or "OTHER" ON THIS SCREEN. YOU CANNOT GO BACK AND CHANGE IT ONCE YOU HIT SAVE. IF YOU MAKE A MISTAKE, NOTIFY THE DATA MANAGER.

***When entering a family, start with the dad - Head record.**

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 text boxes for Last Name, First Name, Middle, Title, Suffix, and Goes By.
- Lists:** A vertical column of dropdown menus for Ethnic Background, Religious Background, Occupation, Child Dedication, Not Defined, Restrictions, Language Usage, First Friends, Not Defined, Send Envelopes, Reason Inactive, and Blood Type.
- Fields:** Text boxes for Un-authorized P/U, Allergies, First Visit, and School.
- Dates:** A section containing dropdown menus for Date Baptized, Marriage Date, Salvation Date, Deceased Date, and Date Inactivated. The "1st Time Visit" field is circled in red and contains the date "8/1/11".

Annotations include a red box with the text "CLICK HERE WHEN DONE" and a black arrow pointing to a "Family Fields" button located below the "1st Time Visit" field. At the bottom of the window 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, there is a "Profile Fields" button. At the bottom of the form, there are four buttons: "Save/Add Another Family", "Save/Add Family Member", "Save", and "Cancel". The "Save" button is highlighted with a red border.

Annotations:

- A starburst callout points to the "Campus Attended" field with the text: "The Campus Attended field is super important! Please check this for every person's record in the Family Tab."
- 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 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: []

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 a parent only provides a cell number, please make sure you add it in their record as a Home [Address] number and as their cell number.
***Remember, you add Home [Address] phone numbers in the “Address” tab.**

GROUPS TAB

→ This is where we enter children into their class group so they can be checked in next week.

View/Edit Individual

Name Information

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

▶ Activities **▼ Classes** ▶ Small Groups

Effective Date: Show All

Group	Date Last Attended	Primary Flag	List 1	List 2	List 3
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Make sure the effective date is changed to the day they attended CF Kids BEFORE you click the "Add" button.

→ Once you click the "Add" button, this screen pops up:

New Roster

Master Group: Effective Date:
Locate: Group: Primary
 Show Deactivated

General Fields

Status:
Position:
Open Category:
Open Position:

Activation Dates

Date Add:
Date Dro:

IMPORTANT NOTE

- › On the left side of the screen, click on the class that they are in according to campus:
- › CF Students and CF Kids who are placed on a roster are always labeled:
 - Status: *Member*
 - Position: *Member*

Add Another

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 with the 'Connections' tab selected. A red arrow points to the 'Individual' dropdown menu in the 'Family' section. A red callout bubble points to the 'Prospect Source' dropdown menu, which is currently set to 'Personal Invite'. Another red callout bubble points to the 'Add' button in the 'Contacts' table.

Step 2: Select this dropdown to indicate how they heard about CF.

Step 3: Select the “Add” button to add a 1st Time Guest Connection, Signup, or Decision.

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]

Details **Response** [Complete]

Classification

Individual Inward
 Family Outward

Date: 9/8/2011

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** [Cancel]

Step 4:

- › **Date:** Make sure the date entered is the correct service date.
- › **Type:** Select "CF Kids Guest Form"
- › **Signup/Decision:** Select "1st Time Guest"