Contact Management

Churches and non-profit organizations are in the "people business." Maintaining contact and updated information remains a high priority for your organization. This class will focus on the use of CDM+ Visitation Records emphasizing the use of reminders with the push notification feature, Pastoral Records, Individual Connections Tab, and other features as means to stay connected.

The Visitation and Pastoral records provide an effective means of tracking ministry with individuals and families in the Membership program. Ministry actions already completed may be entered or set reminders for future ministry actions, or both. By enabling push notifications on a phone or tablet, reminders can now pop up giving you real-time information.

For example, Mr. Stevens dies and entries can be made in Visitation records to track ministry to the family during this time of bereavement. Follow-up actions may be scheduled in Reminders to insure contact on an on-going basis as Mrs. Stevens adjusts to life without her husband of 55 years. One reminder may include an invitation to her to join the "Life without Spouses" class scheduled in 5 weeks. A second reminder could be scheduled to push to the Lead Pastor's phone one year later to call Mrs. Stevens and let her know the church hasn't forgotten.

Due to the personal nature of such information access to Pastoral and Visitation records can be limited by both a default setting or on a per entry basis. This insures people who need to view and work with this information have access while maintaining the access restrictions of other users. There are three types of access control: User Permissions, User Preferences, and the Pastoral and Visitation record Access tab.

► File ► Administration ► Users tab

Use the Administration window to set access to all Visitation and Pastoral Records.

••	•			A	dministration
~ [©] >	llaara	Users		User	
	Users	Name ^	Last Logged In		
0		Administrator	Jan 16 2023 3:37 PM	Name:	Administrator
∕~	Access	Chris Watson	May 20 2022 4:10 PM	Username:	Administrator
-		CICO Church Class	Never logged in	Password:	Change Password
	Mobile	CICO Nursery	Never logged in		
-		CICO Preschool	Aug 18 2015 12:21 PM	Access Setting:	
♥	Updates	Dana	Dec 20 2017 6:14 PM		Disable Login
_		Dean Phelps	Jun 20 2022 5:42 PM		Limit to Check-In/Check-Out operations only
1	Payroll	Eric Womack Judy Jones	Never logged in Jan 7 2023 12:53 PM	Permissions	
		Lucille Allen	May 4 2022 3:52 PM		
[]	Sets	Pastor	Feb 27 2019 4:15 PM	Turn On All Per	missions Turn Off All Permissions
נג	5015	Patricia Jones	Jan 16 2023 8:58 PM	Membership	All None
\bigcirc	- ·	Ruth Stokes	Sep 6 2023 9:13 AM		Address View Add/Change/Delete Print
	Searches				
Ê,					Individual 🗸 View 🗸 Add/Change/Delete 🗹 Print
×1	Notices				Pastoral 🗸 View 🗸 Add/Change/Delete 🗸 Print
-					Visitation 🗸 View 🖌 Add/Change/Delete 🗸 Print
	Encryption				
×.		Add User Delete U	ser		Attendance 🗸 View 🖌 Add/Change/Delete 🗸 Print
		Access Settings			Preaching Aids 🗹 View 🗸 Add/Change/Delete 🗸 Print
		Description ^			Media Ministry 🗸 View 🗸 Add/Change/Delete 🗸 Print
		Bookkeeper			
		Mobile Attendance			User can access Membership preferences
		Pastors			 User can modify Visitor Records
				Contributions	All None
					an a
					Giving Unit 🗹 View 🗸 Add/Change/Delete 🗹 Print
					Contribution 🗸 View 🗸 Add/Change/Delete 🗸 Print
					Giving History 🗸 View 🗸 Add/Change/Delete 🗸 Print
		Add Setting Delete	Setting		
	Collapse	Revert			Save

► CDM+(macOS)/File (Windows) ► Preferences ► CDM+ User ► Membership and Attendance tab ► Visitation icon

Use User Preferences to set the default access to Visitation and Pastoral Records created by this user. Access settings can be changed for any particular Visitation or Pastoral Record.

This screen displays the list of users defined in Administration. Click on the names you wish to set as default to see Visitation Records and/or Visitation Reminders. The option to select users as default to see Pastoral Records are accessed by clicking the Pastoral icon. All users that are selected to see reminders, that have a device with push notifications enabled, will have the reminder pop up on their device.

•		User Prefer	ences			
Gen	eral Membership and Attendance	Contributions	Accounting	Roommate	Check-In/Check-	Out
Visitation	Pastoral					
Check 1	isitation reminders at startup for reminders every minute		ound alert when			
Allow these use	ers access to my entries	Allow	these users to s			
Private	Administrator	\bigcirc	Private	dministrator		
Public	Chris Watson	\bigcirc	Fublic	hris Watson		
Selected	Dana		Selected D	ana		
	Dean Phelps			ean Phelps		
	Eric Womack		- E	ric Womack		
	Judy Jones		L 🗌	udy Jones		
	Lucille Allen		- L	ucille Allen		
	Pastor		- P	astor		
	Patricia Jones		_ P	atricia Jones		
	Ruth Stokes		🗹 R	uth Stokes		
	All None		All	None		
Revert D	splayed Settings				Cancel	Save

Visitation Records

▶ Program ▶ Membership ▶ Visitation Records

Provides for the tracking of visits and contacts to people in the Membership program. Visitation Reminders can be created to prompt you of follow-up actions (visits, calls, or other contact) at a scheduled date and time. Staff Codes and Visit Types are defined by the Mater Coding System; reports can be printed by these codes and a Summary report printed that includes mileage and number totals.

Visitation Records may also be used to track Volunteer hours worked.

If a visit is made to only one member of the family, click the down arrow beside the Individual Information field and make your selection.

NOTE: You can rename "Mileage" and "Number" under CDM+ System Preferences ► Membership and Attendance tab ► Fields icon ► Visitation Fields radio button.

•	• •				Visitation	Records			
	SHOW	Visitat ^	First Name	Individual Last	Last Name	Primary Phone	Salutation Name		
*	All	Oct 5 2020	Susan	Disney	Disney	606.555.1739	Mike & Susan		
T		Feb 23 2021	Michael	Disney	Disney	606.555.1739	Mike & Susan		
0	None	Oct 2 2021	Michael	Disney	Disney	606.555.1739	Mike & Susan		
Q	Find	May 7 2022			Disney	606.555.1739	Mike & Susan		
1		Aug 12 2022	Susan	Disney	Disney	606.555.1739	Mike & Susan		
Q	Searches	Oct 2 2022	Michael	Disney	Disney	606.555.1739	Mike & Susan		
	Grid	Feb 7 2023	Charlotte	Deweese	Deweese	606.555.0104	Nathan and Cha		
-	Reports	Mar 7 2023	Charlotte	Deweese	Deweese	606.555.0104	Nathan and Cha		
-		🚗 Visitatio	on Record on Oo	t 2 2022				12 Results 🧧	Filtered
	DO	6 :	Notes : Acce	ss :					
+	Add	•							
Ð	Multi-Add								
1	Change		Address Informatio		Date: Oct	2 2022 📅 S	taff: Assistant Minister	r 🗸 Type: General Pastoral Ca 🗸	
<u> </u>	-		Mr. & Mrs. Michael 107 Peachtree Dr		ect				
T	Delete		Big City, KY 40123	-2318		Comments: A	nniversary of his father	's death.	
c:	Transfer		5	MapO	Quest				
	GO								
_		1	Phone Number: 6	06.555.1739					
	Address		ndividual Informat	on			ep 25 2022		
0	Individual	Ċ.	Michael Disney		lear	Reminder Date: Se	ep 25 2022	Time: 10 ‡ : 00 ‡ AM ‡	
			,		R	eminder Memo			
			Birthdate: Apr 14	1990					
		0	wner: Ruth Stoke						
			ileage: 20.00	Number: 1					
			100ge. 20.00						
ala	0								
\$	Configure								
	Collapse								

Click on the Access tab to change the access options for a specific entry; the default settings will appear. Selecting Private will allow this record to only be viewed by the user who entered it. Public will make it available to all users. Click on Selected to give limited access to persons other than your default choices.

••	-			visitat	ion Records		
DO	Visitat ^ Firs	st Name	Individual Last	Last Name	Primary Phone	Salutati	on Name
Save	Oct 5 2020 Sus	san	Disney	Disney	606.555.1739	Mike & S	Susan
	Feb 23 2021 Mic	chael	Disney	Disney	606.555.1739	Mike & S	Susan
Cancel	Oct 2 2021 Mic	chael	Disney	Disney	606.555.1739	Mike & S	Susan
Transfer	May 7 2022			Disney	606.555.1739	Mike & S	Susan
	Aug 12 2022 Sus		Disney	Disney	606.555.1739	Mike & S	
	Oct 2 2022 Mic		Disney	Disney	606.555.1739	Mike & S	
		arlotte	Deweese	Deweese	606.555.0104	1	and Cha
	Mar 7 2023 Cha	arlotte	Deweese	Deweese	606.555.0104	Nathan a	and Cha
	👄 Visitation R	lecord on O	ct 2 2022				12 Results Filte
	1 : Notes	s : Acc	ess :				
	Access			_	Remind	lors	
		_				fault	Administrator
	O Default						
	Private				O Pri	ivate	Chris Watson
	Public				🔵 Pu	blic	Dana
	Selected				🗿 Se	lected	Dean Phelps
							Eric Womack
							Judy Jones
							Lucille Allen
							Pastor
							Patricia Jones
							Ruth Stokes

NOTE: Visitation of prospective members to your church may be tracked through Visitor Records in the Attendance program.

Visitation Reminders

▶ Program ▶ Membership ▶ Visitation Reminders

Visitation Reminders may be accessed from the menu or set to display when you log into CDM+. Click the down arrow to select an Action.

• • •		Visit	tation Reminders				
You have these	reminders scheduled from	Visitation records			🗹 Show A	I	
Visit Date	Reminder Date/Time	Visit Type	Staff	Name	Action		
Jan 18 2020	Apr 19 2020 9:30 AM	Hospital Call	Assistant Minister	Susan Disney	Do Nothing	Do Nothing	
Aug 12 2022	Aug 18 2022 1:00 PM		Assistant Minister		Do Nothing	Complete	
Oct 2 2022	Sep 25 2022 10:00 AM	General Pastoral C	Assistant Minister	Mike Disney	Do Nothing	Remind: 1 Day	TClick the Visitation icon
Reminder notes	s for the selected Visitation			Action for all	: Do Nothing	Remind: 3 Days Remind: 5 Days Remind: 1 Week Remind: 2 Weeks Remind: 3 Weeks Remind: 3 Weetks Remind: 3 Months Remind: 3 Months Remind: 6 Months Remind: 1 Year	under the Membership and Attendance tab of User Preferences to choose when Reminders will display.
Print				Canc	cel OK		

Visitation Records and Reminders may be used to track a variety of ministry applications. Some examples include: Death of Member, Grief Follow-up, New Members Assimilation, and Volunteer Tracking. The key to this multiple usage is setup in the Master Coding System:

► File ► Master Coding System ► Codes tab ► Visitation/Pastoral

The Staff and Visitation Type fields allow for specific code setup. Below is a sample of Staff codes.

tion	Program	Visitation/Pastoral Code Types	Staf	f Codes	Details fo	r Assistant Minis	ster
Codes	Address	Staff	χ	Assistant Minister	Leader(s	1	
Codes	All Contribution	Visitation Types	χ	Senior Minister	-		
Groups					Location		
- Groups	Groups Individual						
· · · · · · · · ·	Item Category				Area		
User Fields	Roommate Shipping Category				Area		
	Visitation/Pastoral						
	Visitor				Event Tir	ne	
					Entered . by Ruth S	lul 10 2019 3:18	PM
						Jul 10 2019 3:18	
					by Ruth S		2 191
					Usage for	Assistant Minist	ter
					Count ^	Description	
					8	Staff	
	-						
Collapse				dd Code	 1		
/			ρ	dd Code			1

Below is a sample of the Visitation type codes.

Function	Program	Visitation/Pastoral Code Types	Visitation Types Codes	Details for Death of a Loved One
	Address	Staff	X Counseling	
Codes	All	Visitation Types		Leader(s)
-	Contribution		X Death of a Loved One	
	Event Registration		X General Pastoral Call	Location
Groups	Groups		X Hospital Call	Location
	Individual			
	Item Category Roommate			Area
Sei Fields	Shipping Category			
	Visitation/Pastoral			
	Visitor			Event Time
				Entered Jul 10 2019 3:16 PM
				by Ruth Stokes
				Modified Jul 10 2019 3:16 PM
				by Ruth Stokes
				Usage for Death of a Loved One
				Count ^ Description
				1 Visitation Type
0-11-11-1				
Collapse			Add Code	
	1			

Visitation Reports

A number of visitation reports are available and allow for effective administration of the ministry of your organization. Get Detail reports by Staff, Family, or Individual. Summary reports by Visitation Type and Staff are easily created. Standard and Advanced Searches provide complete flexibility.

Det	tail Record of Visitation Ca First Church 123 Main Street Big City, KY 40123 606/555-1234 All Staff From Oct 1 2022 To Oct 31	Details by Staff report pages by staff member and totals Miles Driven and Number of persons contacted.	
	Assistant Minister		
Date Oct 2 2022 Type General Pastoral Call	Mileage 20.00	Number 1	
Name Michael Ray Disney 107 Peachtree Dr Apt 2 Big City, KY 40123-2318	Phone	606.555.1739	
Comments Anniversary of his father's death.	Reminder Dat Mem	te Sep 25 2022 Io	
Summary for Assistant Minister			
Number of Calls Made	1		

▶ Reports ▶ Membership Reports ▶ Visitation Details ▶ Detail by Staff

▶ Reports ▶ Membership Reports ▶ Summeries ▶ Visitation Summary

Summary of Visitation Records by Individual First Church 123 Main Street Big City, KY 40123 606/555-1234 All Staff From Oct 1 2022 To Oct 31 2022 Summary by Individual or Family contacts; pages by Staff Code if desired. Select the Staff codes to include and the Visitation Types.

Name	Type of Visit	Number of Calls	
Mike Ray Disne	ey		
	General Pastoral Call	1	
	Mike Ray Disney Total	1	
	Total	1	

CDM+ Mobile Visitation

Open **Individuals**, find an individual and tap the **Visitation** tab to bring up visitation information for that individual. Note that it may be under the **More** tab.

Any visitation records you have permission to view will display by date, with a blue **Add New Visitation Record** button at the top.

If there are no Visitation Records (or any to which you have access) for this individual, the screen will read "No Visitation records found" and a blue **Create New Visitation Record** button.

To Add a Record

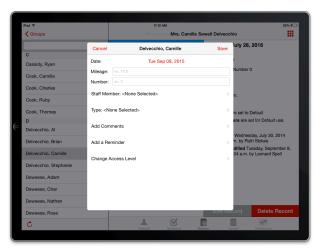
Tap either the blue Add New Visitation Record or Create New Visitation Record button.

On iOS, a popover will appear. On Android, the area will change.

On this screen you can alter all, some or none of the options present. To save the visitation record, tap the **Save** button.

The visitation date is always preset to today's date, if you want to change this, tap inside the field for iOS and with the date picker that shows up, choose the preferred date, then tap **Save Date**. On Android, tap the **Edit Date** button and a pop-up will appear with a calendar. Select the date you desire and tap **Done**.

To change the **Number** or **Mileage** of the Visit, tap into their respective input fields.



To change the staff person associated with this record, tap the **Staff Member** button and a list of staff positions will appear. You may select one or none.

To change the type associated with this record, tap the type button and a list of types of visitation will appear. Again, you may select one or none.

To add a comment to the visitation record, select **Comment**. Here you may enter a message about the visitation. When you are finished entering the message, tap **Save**.

Select **Add a Reminder** to enter a reminder message, change the date of the reminder, and set the time of the reminder. Reminders will push to all devices of the individuals who have been given access, this will only occur if push notifications are allowed on the device and settings have been set in Administration.

11:58 AM Wed Aug 28			\$ 89%
Groups Adult Choir		Armstrong David	
Q	Armstrong, David Clear Reminder	Save	13, 2024
A	Reminder Date: Wed Aug 28, 2024		ice 0
Allen, Jenny	Reminder Time: 11:57 AM		e what happens
Allen, Jessica			me mind Friday, June 14, 2024
Allen, William			04:35 p.m.
Andrews, Elizabeth			
Armstrong, David			Access is set to Private lers are set for Dean Phelps use.
Armstrong, Glenda			
account, test			hursday, June 13, 2024 08:31 p. by Nexus Test Main
в			ified Tuesday, July 16, 2024 06: p.m. by Dean iPad Main
Brittain, Roslyn			part by bear is a main
F			
Fitzpatrick, Jack			
Folsom, Lute			Delete
c	Attendant	e Visitation	Pastoral A Groups

Just like the Visitation Date, the Reminder Date is always preset to today's date and it can be changed in the same manner.

The Reminder Time is always preset to 9:30 am. If you want to change this time, tap inside the field for iOS and with the time picker that shows up, choose the preferred time and tap **Save Time**. On Android, tap the **Set Time** button and a pop-up will appear with a calendar. Select the time you desire and tap **Done**.

To change the access level for either viewing or reminders, tap the **Change Access Level** button. Here you may select from Default, Private, Public, or Selected for both Access or Reminder. Access and reminder are always enabled for the creator of the record, for other users, a green check mark will appear next to their names if they are selected.

Default reflects the defaults set for the user here: ► CDM+(macOS)/File(Windows) ► Preferences ► CDM+ User ► Membership and Attendance ► Visitation

If a user is selected by Default, they will have a green check mark next to his/her name.

Private is restricted to the user who creates the record. In this case, no other users will be selected.

Public is set for everyone, including the creator of the record. In this case, everyone has green check marks.

Selected allows you to select who gets access. Simply tap on each user to whom you want to give viewing access and a green check mark will appear.

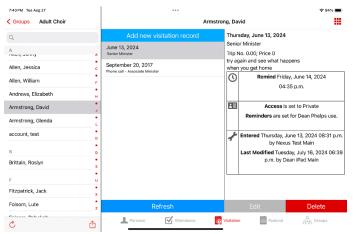
Setting Reminder access is the same process. **NOTE: Access** and **Reminder** are separate, so you must set both.

When all your fields are set, tap **Save** to save the record.

To View a Record

When you have access to existing visitation records for an individual, tapping the **Visitation** tab will display a list of those records. The list will contain the date of the visitation, the staff member that made the visitation record (if set), the type of visitation (if set), and a clock icon if the visitation record has a reminder that is set for today or later.

Tap on a record and it will appear in the detail view with all the information associated with that record. **NOTE:** Records are viewable only to those that have access to the record, or have created it.



Each Mobile Provision can be linked to a user in CDM+, and thereby inherits the access that user has to visitation records set in CDM+. This user assignment is set on the Mobile Provisioning window under Administration.

Groups			Mrs. Camil	le Sewell Delvecc	hio	
	Cancel			Save	luly 28, 2016	
С		Ac	cess			
Cassidy, Ryan	Detault	Private	Public	Selected	Number 0	
Cook, Camille	Administrator					
Cook, Charles	Alex Clay					
Cook, Ruby	Beth Lancaster				n.	
Cook, Thomas					is set to Default	
D		Ren	ninder		ers are set for De	lault use.
Delvecchio, Al	Default	Private	Public	Selected		
Delvecchio, Brian	Administrator				Wednesday, July m. by Ruth Stokes	30, 2014
Delvecchio, Camille	Alex Clay				dified Tuesday, S 04 a.m. by Leona	eptember 8, rd Spell
Delvecchio, Stephanie	Beth Lancaster					
Deweese, Adam	Caleb Sayre					
Deweese, Char	Elizabeth Mudd					
Deweese, Nathan	Eric Folsom					
Deweese, Rose				Edit Re	cord Dele	te Record
Ċ.		1	V	C.		

To Edit a Record

Only the creator of the record can edit or delete a record.

Tap on the record you want to edit, and on the details page, select Edit.

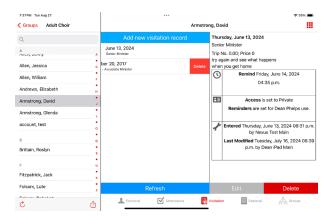
After adjusting the field(s) that you want changed, tap **Save**. The record will now be updated both in the CDM+ Mobile app and the CDM+ Visitation Records window on the Membership menu.

To Delete a Record

There are two ways to delete a record.

1. On the Visitation Record list for iOS slide the record to the left, and a Delete button will appear. Tap it and a pop up will appear asking you to confirm the action. Once confirmed, the record will be deleted. On Android, press and hold down on the record for one second, and a pop-up will appear asking you to confirm deleting the record. Once confirmed, the record will be deleted.

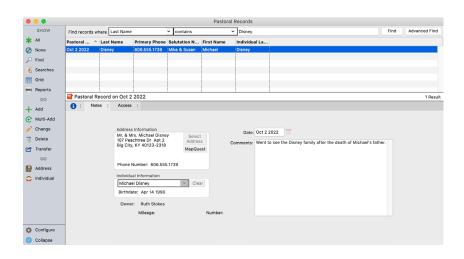
2. When viewing the detail of a record, you will see a Delete Record button at the bottom of the page. If you tap it, a pop up will appear asking you to confirm the action; once confirmed, the record will be deleted.



Pastoral Records

Pastoral records provide tracking of ministry actions by ministerial/pastoral staff separate from Visitation records to enhance privacy. Staff members may opt to share entries made with other staff members or keep them completely private on an entry by entry basis.

▶ Program ▶ Membership ▶ Pastoral Records



Click the Access tab to set user access for this specific Pastoral entry.

CDM+ Mobile Pastoral.

Open Individuals, find an individual and tap the Pastoral tab. Note that it may be under the More tab.

Viewing, adding, editing, and deleting Pastoral Records via the CDM+ Mobile app works in the same way as described above for Visitation Records.

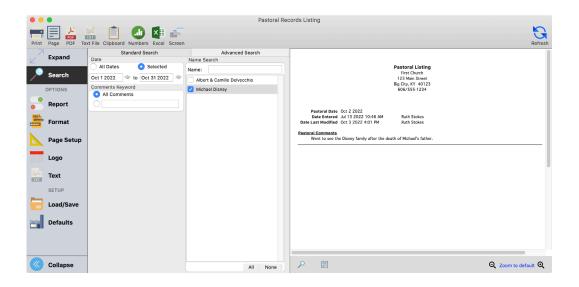
Records are viewable only to those that have access to the record or have created it. Each Mobile Provision can be linked to a user in CDM+, and thereby inherits the access that user has to pastoral records. Default access to Pastoral Records is set for the user in **CDM+ User Preferences** ▶ **Membership and Attendance** ▶ **Pastoral** icon. The user assignment is set on the Mobile Provisioning window under Administration in CDM+. Only the creator of the record can edit or delete a record.

7:39 PM Tue Aug 27				🗢 94% 🔳		
Groups Adult Choir		Armstrong David				
Q	Cancel	Armstrong, David	Save	13, 2024		
A	Date:	Tue Aug 27, 2024	ŧ.	ice 0		
Allen, Jessica	Trip No.: ex. 10			e what happens		
Allen, William	Price: ex. 2			mind Friday, June 14, 2024		
Andrews, Elizabeth	Staff Member:	<none selected=""></none>	>	04:35 p.m.		
Armstrong, David	Type: <none s<="" td=""><td>Selected></td><td>></td><td>Access is set to Private</td></none>	Selected>	>	Access is set to Private		
Armstrong, Glenda	Add Comment	s	>	lers are set for Dean Phelps use.		
account, test	Add a Reminde	er	>	hursday, June 13, 2024 08:31 p.m by Nexus Test Main		
В	Change Acces	s Level	>	ified Tuesday, July 16, 2024 06:39		
Brittain, Roslyn	Owner		>	p.m. by Dean iPad Main		
F						
Fitzpatrick, Jack						
Folsom, Lute				Delete		
C.	<u>۴</u>	Personal 🗹 Attendance	Visitation	Pastoral A Groups		

Pastoral Reports

▶ Reports ▶ Membership Reports ▶ Listings and Exports ▶ Pastoral Records Listing

Search on key words to locate records using the "Comment" field and the "Contains" modifier in addition to standard searches on date fields, name fields, etc.



Connections

Throughout the program, there is a tab called "Connections". Under the Connections Tab, the last tab inside the Individual Record, other records in CDM+ can be linked to track relationships.

		1	1		ividual Records				
DO		Individual L ^		Primary Phone	Salutation Name				
Save	Stacy			606.555.7660	James and Sheila				
0	James	Washington		606.555.7660	James and Sheila				
Cancel	Edward	Washington		606.555.7660	James and Sheila				
	Sheila	Washington		606.555.7660	James and Sheila				
	Chris	Watson	Watson		Chris				
	Alpha	Willett	Willett		Alpha				
	Ronald	Wilson	Wilson		Ron & Missy				
	😂 Chris W	/atson						231 Result	ts Filtered
	< : Pł	hotos : User Fi	ields : Attendan	ice : Pastor	al : Visitation :	Events :	Notices : Check-In :	Connections :	Engage
	Chris Watsor	n Si	elect record type:						
			20	Ъ		<u>.</u>			
				•					
				=					
			Address R	ecords	Check-In/Check-C	out Event Records	Contact Reco	ords	
			2		ŏ	Θ			
					7				
			I			.			
			Customer F	Records	Employee I	nformation	Event Recor	ds	
			—		-				
			<u> </u>			4	64		
				<u> </u>	_				
			Giving Unit	Records	Individual	Records	Memorial Gift Design	ees Records	
			Giving Unit	Records	Individual	Records	Memorial Gift Design	ees Records	
			Giving Unit	Records	Individual	Records	Memorial Gift Design	ees Records	
			1		1		ROOMS		
			Giving Unit		Individual) <u> </u>		
			1		1		ROOMS		

NOTE: Church Records and Contacts will only appear if you have the CDM+ Regional Program.

Individual Record Connections

Relationships among individual records can easily be tracked and linked giving the user the ability to click and expand records to reveal the "web" of connections.

A few examples of individual Connections (Codes) could be:

Mother	Sister	Stepmother
Father	Brother	Stepfather
Grandmother	Aunt	Stepbrother
Grandfather	Uncle	Stepsister

► File ► Master Coding System ► Codes tab ► Individual

Inside Master Coding a list of connection types can be created and used across all connection records. Codes can also be created and added to Master Coding as connections are being created.

		Mas	ter Coding System													
Function	Program	Individual Code Types	Family Status Options		 • • 					Individ	ual Records					
Codes	Address All	Church School Class Church School Status	Track Attendance		DO Save	First Name Stacy	e Individual L Washington	· · La w. 🔞	The cod	e "Grandsor	" does not ex	tist. Would you	u like			
	Contribution	Family Status	Family Status Codes	Details for Adult	-	James	Washington	w	to add in							
Groups	Event Registration	Gender	X Adult	Leader(s)	🙁 Cancel	Edward	Washington	w.			No	0 Ye	rs and a second			
Groups	Groups	Individual Title Marital Status	X Child			Sheila	Washington	w								
	Item Category	Membership Codes	X Head of Household			Chris	Watson	Watson			nris					
🔆 User Fields	Roommate	Membership Status	χ Other	Location		Alpha	Willett	Willett			pha on & Missy					
	Shipping Category	Occupation Type	X Spouse			Renald Chris		Wilson		INC	n a Missy					
	Visitation/Pastoral	School	A spouse	Area												sults Filtered
	Visitor			Alea					Allendarice ;	Pastoral	Visitation	; Events ;	Notices :	Check-In ;	Connections	Engage >
						Chris Wate	son	Select Conne	ection type:							
				Event Time												
								Chris Watson	is Mabel Grun	dy's Grandso		-				
				Entered Feb 26 2019 4:21 PM by Administrator				Mabel Grund	y is Chris Wats	on's		-				
				Modified Feb 26 2019 4:21 PM by Administrator												
				Usage for Adult												
				Count ^ Description												
				121 Family Status												

Entering a Family Connection

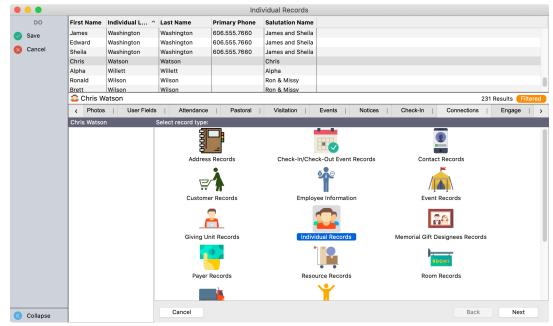
▶ Program ▶ Membership ▶ Individual Records ▶ Connections Tab

After locating the individual for whom you would like to create a connection:

- 1. Change Record (located on left hand side)
- 2. New (located under the individuals name)

				Indi	vidual Records					
DO	First Name	Individual L ^	Last Name	Primary Phone	Salutation Name					
Save	Stacy	Washington	Washington	606.555.7660	James and Sheila					
	James	Washington	Washington	606.555.7660	James and Sheila					
Cancel	Edward	Washington	Washington	606.555.7660	James and Sheila					
	Sheila	Washington	Washington	606.555.7660	James and Sheila					
	Chris	Watson	Watson		Chris					
	Alpha	Willett	Willett		Alpha					
	Ronald	Wilson	Wilson		Ron & Missv					
	😂 Chris W	atson							23	1 Results Filtered
	Photos Photos	: User Fields	: Attendance	Pastoral	Visitation :	Events :	Notices :	Check-In :	Connections	Engage :
	Chris Watson									

3. Select the type of connection to add, in this instance, "Individual Records"



4. Locate the individual to connect.

DO	First Name	Individual L ^	Last Name	Primary Phone	Salutation Name		
	Stacy	Washington	Washington	606.555.7660	James and Sheila		
Save	James	Washington	Washington	606.555.7660	James and Sheila		
Cancel	Edward	Washington	Washington	606.555.7660	James and Sheila		
	Sheila	Washington	Washington	606.555.7660	James and Sheila		
	Chris	Watson	Watson		Chris		
	Alpha	Willett	Willett		Alpha		
	Ronald	Wilson	Wilson		Ron & Missv		
	😂 Chris W						31 Results Filter
	< Photos	User Fields	: Attendance	Pastoral	: Visitation : Events :	Notices : Check-In : Connections	Engage :
	Chris Watso	n Find	records where:				
		Find	records where La	ast Name	✓ equal to	 Grundy Find Advanced Find 	SHOW
			t Name		^ Last Name		🔺 All
						Phone Number	
		Mab	el		Grundy	859.555.8912	🔎 Find
							ह Searches
							DO
							+ Add
							+ Add
							+ Add Select Back
							+ Add Select Back GO
							+ Add Select Back
							+ Add Select Back GO
							+ Add Select Back GO
							+ Add Select Back GO

- 5. After selecting an individual, click Next in the lower right hand corner.
- 6. Enter or use the dropdown arrow to choose the connection code to use.

• • •				Ind	ividual Records					
DO Fi	irst Name	Individual L	^ Last Name	Primary Phone	Salutation Name					
Save St	tacy	Washington	Washington	606.555.7660	James and Sheila					
Ja	ames	Washington	Washington	606.555.7660	James and Sheila					
🚫 Cancel 🛛 Ec	dward	Washington	Washington	606.555.7660	James and Sheila					
St	heila	Washington	Washington	606.555.7660	James and Sheila					
Cł	hris	Watson	Watson		Chris					
AI	lpha	Willett	Willett		Alpha					
		Wilson	Wilson		Ron & Missv					
	📮 Chris Wa	atson							231	Results Filtered
	< Photos	: User Fie	elds : Attendance	: Pastoral	Visitation :	Events :	Notices :	Check-In :	Connections :	Engage : >
C	hris Watson	s	Select Connection type	ə:						
		0	hris Watson is Mabel (Onum duta Casa da a	in 🔽					
		C	inns watson is Maber	Grundy's Grandso	n 🞽					
		N	label Grundy is Chris \	Natson's Grandm	other 🔽					
		10	aber orundy is chiris i							

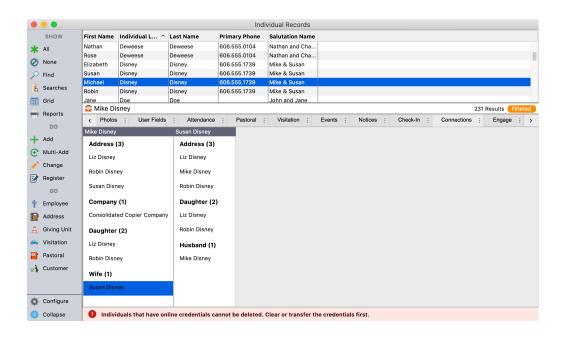
- 7. Click Done in bottom right-hand corner.
- 8. When finished adding all connections, click Save on the left sidebar.

Viewing Connections

To expand the family connections, simply click the individual you would like to view and a second window

will open to the right showing their connections. As the viewer continues to click, windows open to follow the web of connections.

	1				vidual Records					
SHOW	First Name	Individual L ^	Last Name	Primary Phone	Salutation Name					
All	Nathan	Deweese	Deweese	606.555.0104	Nathan and Cha					
	Rose	Deweese	Deweese	606.555.0104	Nathan and Cha					
None	Elizabeth	Disney	Disney	606.555.1739	Mike & Susan					
Find	Susan	Disney	Disney	606.555.1739	Mike & Susan					
Searches	Michael	Disney	Disney	606.555.1739	Mike & Susan					
	Robin		Disney	606.555.1739	Mike & Susan					
Grid	Jane	Doe	Doe	1	John and Jane	1				
Reports	S Mike Di									Results Filte
	< Photos	: User Fields	: Attendance	: Pastoral :	Visitation	Events :	Notices :	Check-In :	Connections :	Engage
DO	Mike Disney									
Add	Address (3)								
Multi-Add		5)								
	Liz Disney									
Change	Robin Disn	ev.								
Register		- ,								
GO	Susan Disr	ey								
		(1)								
Employee	Company	(1)								
Address	Consolidat	ed Copier Company								
Giving Unit										
Giving Unit	Daughter	(2)								
Visitation	Liz Disney									
Pastoral										
	Robin Disn	еу								
Customer	Wife (1)									
	Susan Disr	ey								
Configure										



SHOW	First Name	Individual L ^	Last Name	Primar	y Phone	Salutation	Name					
All	Nathan	Deweese	Deweese	606.55	5.0104	Nathan an	d Cha					
All	Rose	Deweese	Deweese	606.55	5.0104	Nathan an	d Cha					
None	Elizabeth	Disney	Disney	606.55	5.1739	Mike & Su	an					
Find	Susan	Disney	Disney	606.55	5.1739	Mike & Su	an					
	Michael	Disney	Disney	606.55	5.1739	Mike & Su	an					
Searches	Robin	Disney	Disney	606.55	5.1739	Mike & Su	an					
Grid	Jane	Doe	Doe			John and	ane					
Reports	😂 Mike D	isney									231	Results Filte
	< Photo	s : User Fields	: Attendance	- 1	Pastoral :	Visitatio	n ;	Events :	Notices :	Check-In	Connections	Engage :
DO	Mike Disney	/	Susan Disney		Liz Disney							
Add	Address	(3)	Address (3)		Address	(3)						
Multi-Add												
	Liz Disney		Liz Disney		Mike Disr	ney						
Change	Robin Disr	ney	Mike Disney		Robin Dis	ney						
Register												
GO	Susan Dis	ney	Robin Disney		Susan Di	sney						
Employee	Company	y (1)	Daughter (2)	Father (1)						
Address	Consolida	ted Copier Company	Liz Disney		Mike Disr	ney						
Giving Uni	Daughte	r (2)	Robin Disney		Mother	(1)						
Visitation	Liz Disney		Husband (1)		Susan Di	sney						
Pastoral	Robin Disr	ney	Mike Disney		Sister (1	n						
Customer	Wife (1)				Robin Dis	·						
	Susan Dis	ney										
Configure												
Collapse	🚺 Indiv	iduals that have on										

• • •					Indi	vidual Rec	oras						
SHOW	First Name	Individual L ^	Last Name	Prima	ry Phone	Salutation	n Name						
All	Nathan	Deweese	Deweese	606.5	55.0104	.0104 Nathan and Cha							
	Rose	Deweese	Deweese	1	55.0104	Nathan an							
None	Elizabeth	Disney	Disney		55.1739	Mike & Su							
Find	Susan	Disney	Disney		55.1739	Mike & Su							
Searchee	Michael	Disney	Disney	1	55.1739	Mike & Su							
Grid	Robin Jane	Disney Doe	Disney Doe	606.5	55.1739	Mike & Su John and							
Grid	Cane Mike Di		Due			Sonn and	Jane	:			2:	31 Results 🕞	ter
Reports	< Photos	-	: Attendance	:	Pastoral :	Visitatio	n :	Events :	Notices :	Check-In :	Connections	_	:
DO				:		Visitatio			1101000	oncor in :	Connections	: Engage	•
Add	Mike Disney		Susan Disney		Liz Disney		Robin D						
	Address	(3)	Address (3)		Address	(3)	Addre	ess (3)					
Multi-Add	Liz Disney		Liz Disney		Mike Disn	ney Liz Disney							
Change	Dahia Dian		Miles Disease		Dahla Dia	isney Mike Disney							
Register	Robin Disn	ey	Mike Disney		Robin Dis	ney	MIKE L	Jisney					
GO	Susan Disr	ney	Robin Disney		Susan Dis	sney	Susan	Disney					
	•	(4)	D		Father (*		Fathe						
Employee	Company	(1)	Daughter (2)	,	Father ("	Fathe	er (1)					
Address	Consolidat	ed Copier Company	Liz Disney		Mike Disn	ney	Mike D	Disney					
Giving Unit	Daughter	(2)	Robin Disney		Mother	(1)	Mothe	or (1)					
	, i	(1)				.,		.,					
Visitation	Liz Disney		Husband (1)		Susan Dis	sney	Susan	Disney					
Pastoral	Robin Disn	ey	Mike Disney		Sister (1)	Sister	r (1)					
Customer								.,					
	Wife (1)				Robin Dis	iney	Liz Dis	sney					
	Susan Disr	ney											
Configure													

Following the same directions, Connection Types can be added for the following records:

Address	Event	Resource
Check-In/Check-Out Event	Giving Unit	Room
Church	Individual	Vendor
Contact	Memorial Gift Designees	Visitor Address
Customer	Payer	

Employee