DESK PROCEDURE - Manage InFellowship Groups

The Faith Church InFellowship portal has a useful set of tools to help you manage your Group. Several key features include Group; management, naming, description, scheduling, adding, inviting & removing members, email blasts, contact management and quick attendance posting. The following procedure will walk you through each of these processes in detail.

Updated 2/6/2015

Step 1) Log in to your InFellowship account

- Faithchurch.cc go to bottom, click on (InF) link
- You may wish to save this location in your browser favorites

Step 2) Click on [Your Groups]

Step 3) If you are an established Group Leader

- You will see two sections
 - Groups you Lead
 - Groups you belong to (if any)
- If you are missing any sections, please contact one of the Champion Team

members to get corrected.

Step 4) Manage your group by clicking on its name

Step 5) You will see a 4 tabbed block area

- Dashboard view schedule, location, information and post board info
- Roster view and edit your group members
- Attendance view all the recorded attendance information
- Prospects view and manage prospect information







Step 6) EDIT YOUR DASHBOARD INFORMATION >>>>>

- The dashboard area will allow you to edit name, schedule, location and • general group information
- To edit any of these areas ٠
 - 0 Click on [View Settings] in right hand column
 - Next to each of the block areas, click Edit or Update to change any of the information
 - Update the Bulletin board slogan, if wanted •
 - 0 Keep the group informed with the latest happenings
 - Update the Details area
 - Enter a catchy details section to attract new members 0
 - Update the Schedule area
 - Meeting times 0
 - Frequency 0
 - Start and stop dates 0
 - Update the Location area
 - Ensure you check [Location is private] in the Location 0 area if you are hosting a home connection group
 - 0 Remember you set the privacy levels in the previous procedure
 - When finished, be sure to click [Saves Changes] at the bottom 0



Bulletin board	
Law says, "Do, 8	& you will live" Grace says, "Live, & you will do"
Published Tuesday, Jar	nuary 20, 2015 by Timothy Allen
Schedule — v	vhen do we meet?
Next meeting:	Thu. February 12, 2015 🔹 7:00 PM – 9:00 PM
Meets Thursday	every 2 weeks effective 2/12/2015 7:00 PM to 9:00 PM
Location — w	here do we meet?
Name	Southbury CT
Description	Friendly home discussion following current bible sermon topics
Address	Southbury, CT 06488 Map
Information	
Campus	New Milford Campus

Save changes

When you click on the [Roster] tab you will see a list of all your current group members

To <u>ADD</u> or <u>INVITE</u> people to join your group

- Click the [Add or Invite someone] link in the right column
 - Enter full first and last name, email address and phone
 - If a person is already a known attendee at Faith Church
 - The system will find that person in the database and prompt you to
 - Either just add them to the group (example if you have already spoken)
 - Click [Add to Group] and they will be on the roster
 - Or send and invite to see if they are interested
 - Click [Send Invite]
 - System will provide a dialog box to enter an invite message
 - If a person is not known, you must go through an invite process, and that person must accept to join the group
 - Fill in First and Last name, email address, and phone if known, click Next
 - The system will inform you this person is not found.
 - Provide a dialog box to enter an invite message
 - \circ $\,$ When finished, click [Send] or [Cancel] to return to the Roster tab $\,$
 - Once a person has been invited, you will find their information on the [Prospects] tab

Send em

When that person accepts the invite, they will be added to your group and you will be notified

To <u>SEND AN EMAIL</u> to the Group or individual members

- Click the [Send an Email] to the group link in the right column
 - You will have the option to 'send to all' or 'select members'
 - Enter text in the Subject line
 - Enter text in the Message body
 - When finished, click [Send email now]
- **This is a handy tool if you need to broadcast a message to the entire group, or selected individuals

To <u>DOWNLOAD</u> member data

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- You can download all your member information in PDF or CSV(excel) format using the download links in the right column under ACTIONS.
 - A CSV download would be ideal for importing your people into a label or card generation application to make name badges or mail merge
 - A PDF download will generate an Adobe PDF document, which cannot be altered, but may be suitable to use as a hardcopy for manual attendance tracking

To <u>EDIT</u> members information, click on the Members name

- o Edit the members information if needed [Edit link in right hand column]
 - Update any new member information you have
 - Name, Address, Phone, email, etc...
 - Remember, any changes that you make to a members record is updated in the overall system, including the Faith Church main database.
 - When finished, click [Save Changes] at the bottom

OW Jee Plain text, no HTML				
	ACTIONS			
	View prospects			
	Add or Invite someone to join			

Send an email to the group Download CSV

Download PDF

ACTIONS
Edit this person
Remove from group
HOUSEHOLD

۲,

R

	Select recipients	
	Bend an email to everyone in the group (5 of 5 people have an email address Let me choose which people to email	
	Subject (required)	
il now	ige plain text, no HTML	

Dashboard

Roster

To <u>REMOVE</u> member from your group

- **Click on the Members Name from the Roster List** 0
 - Click [Remove from group] in right hand column .
 - Click OK to the confirmation message

ACTIONS	
Edit this person	
Remove from group	
HOUSEHOLD	
HUSDano	ACTIONS



Use the Sprocket tool 🔅 to <u>TELL A FRIEND</u> about your group

The 'Tell a Friend' tool allows you to send a link to someone that tells them the details about your group. This 0 function will not record any communication in the

Prospect tab such as Add or Invite someone of

- Click on the Spocket Icon next to the Pros
- **Choose Tell a Friend**
- The system will provide you with a 0

form

- Fill out First Name, Last Name, **Email Address, and Note fields**
- Click [Send]

	Dashboard	Roster	Attendance	Prospects 4	0 1
e options	Bulletin board				🖂 Send an email
rospect Tab	Bulletin board				📹 Add/Invite someone
	Law says, "Do, & you	will live" Grace says, "Live,	& you will do"		Tell a friend
	Published Tuesday, January	20, 2016 by Timothy Allen			e Find a group
Dashboard Ro	ster Atter	ndance Pros	bects 4		
Tell a friend Let a friend know about this group.				Here's t sent	he email that will be
Public group url — will be sent to y https://faithchurchcc.infellowship		southbury bible studyd	iscussion	From: Timothy All	en <timlallen@gmail.com></timlallen@gmail.com>
Your friend's name (required)				Subject:	en has suggested a group
Brenda	(Churchill		Through a	onnao odggoolod a group
Fist Your friend's email (required)	Last Message body. Helio [NAME],				
				Timothy All	en has suggested this
brenda churchill@faithchurch.cc Your friend's email is safe with us. We do not spam, share, or sell email addresses.				group: [GROUP N	AME]
Write a personal note				From this c	humah
Hey Brenda, thought you would	be interested in this gro	цр.		[CHURCH	
			ĥ		I to learn more: ROUP URL]
				YOUR PEF	RSONAL NOTE]
Send					

Example of what the email will look like.

-	fellowshiponemail@activenetwork.	2:44 PM (13 minutes ago) ☆	*	*
	Timothy Allen thinks you would be intere- Southbury Bible Study/Discussion	ested in the following group:		
	***** Timothy wrote ***** Hey Brenda, th group. *****	ought you would be interested in t	his	
	Visit this link to learn more https://faithchurchcc.infellowship.com/G	roupSearch/ShowGroup/1464015/3 I&email=brenda.churchill@faithchu		

<u>Step 8)</u> VIEW, REPORT or EDIT Group ATTENDANCE INFORMATION >>>>	Dashboard F	Roster Attendance	Prospec
The Attendance tab is used for viewing and updating attendance			
It will provide you with graphical reporting and date range		😌 Enter attendance]
To enter past attendance	HOME OROUPS FIND A OROUP ORVINO	Account Contactus Help Sign out	
 Click on [Enter attendance] in the upper right 	FC FAITHCHURCH.CC	believe, grow, and serve	
• You will be provided with options	Post attendance for group meeting on	• Did Meet	1
 Dropdown past Attendance dates 	Thursday, October 09, 2014 at 7:00 PM	Did Not Meet	
 Your group [Did Met] 	Choose an event Thursday, October 09, 2014 at 7:00 PM Create a new event Add your new event		
 Your group [Did Not Meet] 	Save at	tendance Cancel	-

0 Click [Save attendance]

EMAIL ATTENDANCE UPDATES

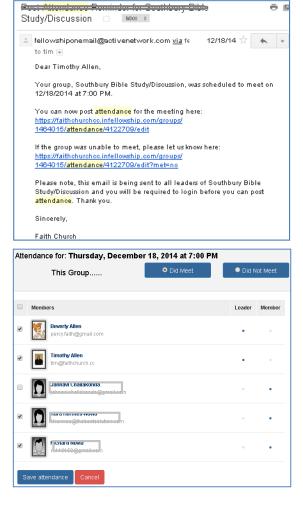
0

The system will send you a 'post attendance email' at the end

Fill out all the information as completely as possible

of each scheduled meeting

- This email will provide a link that you can check-off and quickly post 0 each of the memebers attendance
- With this handy feature, you can litterally record member 0 attendance quickly (with in a few moments) and with great ease!
- When finished, click [Save attendance] 0



Step 9) VIEW and MANAGE PROSPECT INFORMATION >>>>>

that you have previously invited to join your group. This functionality acts like a mini contact management system where you can view and record contact information as you continually reach out to the prospects.

Dashboard	Roster	Attendance	Prospect	s (4) 🐡
4 prospec	ts			
Name	Last contacted	Open	Status	
al co	11 days ago	12/17/2014 at 3:47 PM	Invited	Resend invite
John Doe	8 days ago	1/5/2015 at 12:03 PM	Invited	Resend invite
Ben Dov	15 days ago	1/13/2015 at 8:00 PM	Invited	Resend invite
Tommy Hawk	Waiting to be contacted	Yesterday at 2:33 PM	Invited	Resend invite

Depending on which option you choose

You will be prompted to update the results of the contact

or enter message details for email contact

To Add contact information to a prospect

Roster

- **Click on the Contacts Name**
- You will see 4 options at the bottom
 - Send an Email 0
 - Make a Phone Call 0
 - Met Face-to-Face 0
 - 0 Leave a comment

Dashboard	Roster	Attendance	Prospects	s (4) 🗘	
	is interested	in Southbu	urv Rible	Per	nding
Tommy Hawk is interested in Southbury Bible					
Study/Discussion Prospect					
Timothy sent an invitation to Tommy. Jan. 27. 2015 2:33 Pl					
Send an email	🕾 Make a phone call	🗬 Met face-to-face	tt Leave a comme	ant	

Dashboard	Roster	Attendance	Prospects 4	\$\$ T
John Doe is in Prospect	nterested in S	outhbury Bibl	e Study/Disc	Pending
Timothy sent an invitat	ion to John.		Jan. 05, 2	015 12:03 PM
Timothy made a phone	e call		Jan. 05, 2	015 12:04 PM
Timothy had a face-to- Talked to John at the servi	-	wn visiting his aunt in Buffa		015 12:04 PM
Timothy left a commer	ıt		Jan. 07, 2	015 12:29 PM
o take a trivial example, wł from it?	nich of us ever undertakes	laborious physical exercise	e, except to obtain some	advantage
Timothy made a phon	e call		Jan. 16,	2015 5:06 PM
let message				

0

***We recommend you enter as much detail regarding the communication as possible, such as issues with family, or upcoming problems and even vacation plans. Next time you reach out to this person, you will have details as to the last communication, making a warm, friendly and personal conversation. See below examples.

When finished, click [Save]

Timothy made a phone call Jan. 16, 2015 5:06 PM	Send an email The Make a phone call The Met Tace-to-Tace The Leave a comment
let message	
	Subject (required)
	Interest in Southbury Bible Study/Discussion
	Message body No HTML please
Send an email 🖙 Make a phone call 🗨 Met face-to-face 🛛 🕫 Leave a comment	Hey Tommy, just quickly reaching out to see where you are with the interest in the home bible study group. Please give a quick call and advise me what your plans are. Thanks and God BlessTom
Where did you meet and what did you talk about? No HTML please	
Saw Tommy in the front lobby right after service on Sunday, spoke briefly but he is a volunteer fireman and just received an emergency call and had to cut short.	© Send an email (중 Make a phone call)
	Phone 203-497-8574
	What happened? (required) Left a message Called and no one answered Spoke with Tommy

0

The	Pros	pect	area	is w	here	yo	u wil	l find a	a list of	peop	ole t	
										-		

Attendance Prospects 3