



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

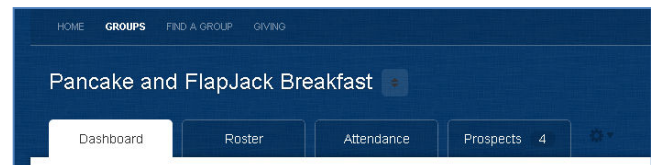
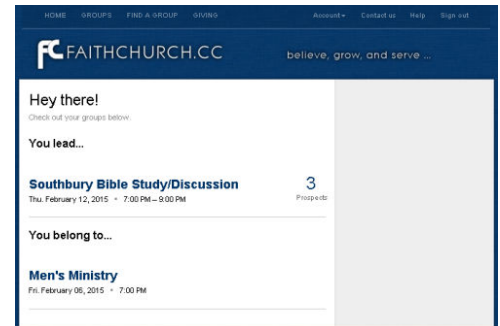
- You will see two sections
 - Groups you Lead
 - Groups you belong to (if any)
- If you are missing any sections, please contact one of the Champion Team members to get corrected.



Step 4) Manage your group by clicking on its name

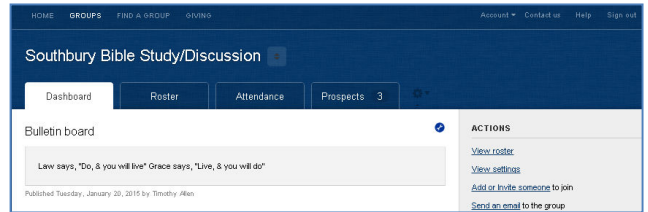
Step 5) You will see a 4 tabbed block area

- 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
 - 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
 - Keep the group informed with the latest happenings
 - Update the Details area
 - Enter a catchy details section to attract new members
 - Update the Schedule area
 - Meeting times
 - Frequency
 - Start and stop dates
 - Update the Location area
 - Ensure you check [Location is private] in the Location area if you are hosting a home connection group
 - Remember you set the privacy levels in the previous procedure
 - When finished, be sure to click [Saves Changes] at the bottom



Bulletin board

Law says, "Do, & you will live" Grace says, "Live, & you will do"

Published Tuesday, January 20, 2015 by Timothy Allen

Schedule — when 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 — where do we meet?

Name	Southbury CT
Description	Friendly home discussion following current bible sermon topics
Address	<input type="text"/> Southbury, CT 06488 Map

Information

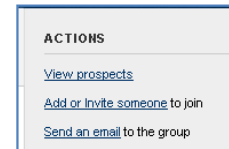
Campus	New Milford Campus
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Save changes

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

To ADD or INVITE people to join your group

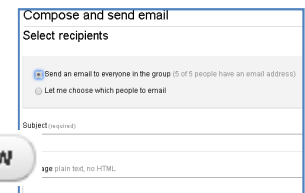
- Click the [Add or Invite someone] link in the right column
 - Enter full first and last name, email address and phone
 - If a person is already a known attendee at Faith Church
 - The system will find that person in the database and prompt you to
 - Either just add them to the group (example if you 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
 - 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
 - When that person accepts the invite, they will be added to your group and you will be notified



To SEND AN EMAIL 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]

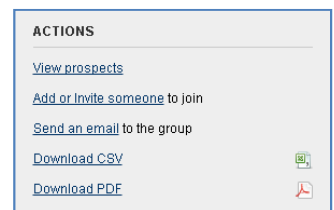
Send email now



****This is a handy tool if you need to broadcast a message to the entire group, or selected individuals**

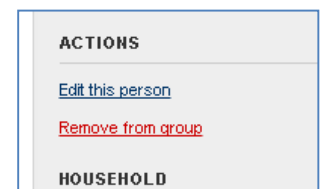
To DOWNLOAD member data

- 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 EDIT members information, click on the Members name

- 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



Save changes

- To **REMOVE** member from your group

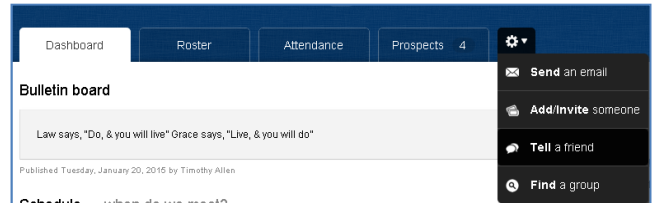
- Click on the Members Name from the Roster List
 - Click [Remove from group] in right hand column
 - Click OK to the confirmation message



- Use the Sprocket tool  to **TELL A FRIEND** 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 function will not record any communication in the Prospect tab such as Add or Invite someone options

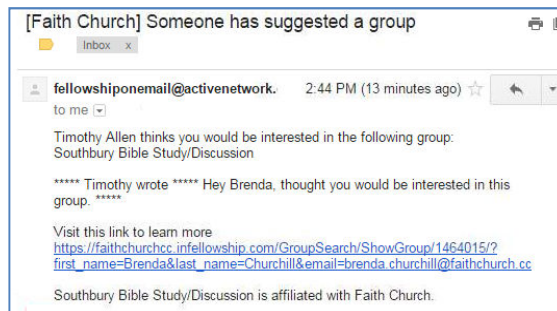
- Click on the Spocket Icon next to the Prospect Tab
- Choose Tell a Friend



- The system will provide you with a form

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

- Example of what the email will look like.

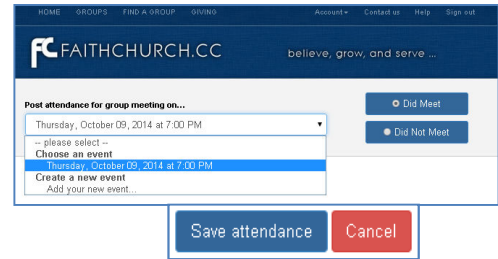


Step 8) VIEW, REPORT or EDIT Group ATTENDANCE INFORMATION >>>>



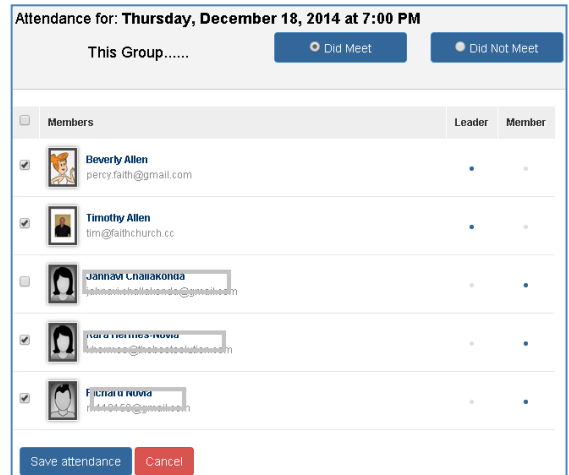
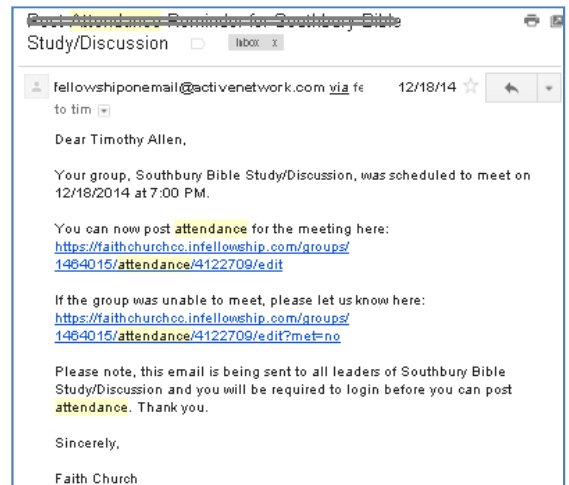
The Attendance tab is used for viewing and updating attendance

- It will provide you with graphical reporting and date range
- To enter past attendance
 - Click on [Enter attendance] in the upper right
 - You will be provided with options
 - Dropdown past Attendance dates
 - Your group [Did Met]
 - Your group [Did Not Meet]
 - Fill out all the information as completely as possible
 - Click [Save attendance]



EMAIL ATTENDANCE UPDATES

- The system will send you a 'post attendance email' at the end of each scheduled meeting
 - This email will provide a link that you can check-off and quickly post each of the members attendance
 - With this handy feature, you can literally record member attendance quickly (with in a few moments) and with great ease!
 - When finished, click [Save attendance]



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



The Prospect area is where you will find a list of people 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.

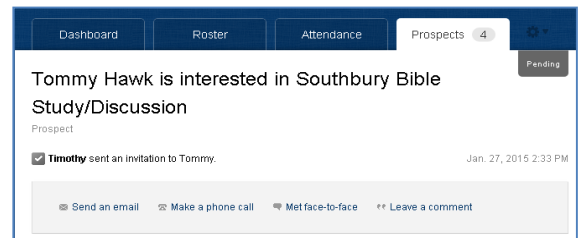
Name	Last contacted	Open	Status	
al co	11 days ago	12/17/2014 at 3:47 PM	Invited	Resend invite
John Doe	8 days ago	1/5/2015 at 12:03 PM	Invited	Resend invite
Ben Dov	15 days ago	1/13/2015 at 8:00 PM	Invited	Resend invite
Tommy Hawk	Waiting to be contacted	Yesterday at 2:33 PM	Invited	Resend invite

- **To Add contact information to a prospect**

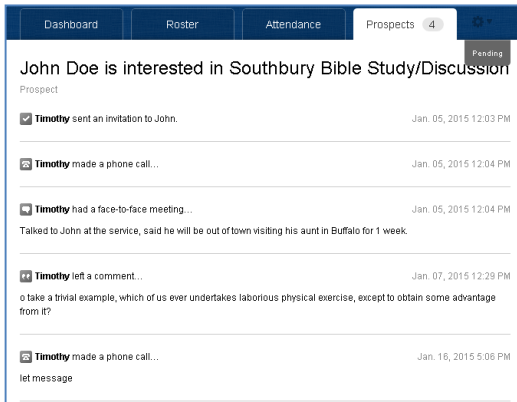
- **Click on the Contacts Name**
- **You will see 4 options at the bottom**
 - **Send an Email**
 - **Make a Phone Call**
 - **Met Face-to-Face**
 - **Leave a comment**

- **Depending on which option you choose**

- **You will be prompted to update the results of the contact or enter message details for email contact**



******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]**

Send an email Make a phone call Met face-to-face Leave a comment

Subject (required)

Interest in Southbury Bible Study/Discussion

Message body No HTML please

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 Bless. -Tom

Send an email Make a phone call Met face-to-face Leave a comment

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 Make a phone call Met face-to-face Leave a comment

Phone 203-497-8574

What happened? (required)

- Left a message
- Called and no one answered
- Spoke with Tommy

... ML please

... we quickly prayed for their grandma, who was having surgery