

Group Manager

When the group leader/manager clicks the link on the church web site to launch the Small Group Manager he or she will be asked to log in (if not already logged in). After successfully logging in, the Group Manager appears in one of two views as shown below:

Small Group Leader View



The screenshot displays the 'Dynamic Church Small Group Manager' interface. At the top, there is a navigation bar with 'Members', 'Attendance', and 'Contacts' on the left, and 'Manage Your Team: Building Relationships' on the right. Below this is a table titled 'Manage Your Team Member List' with a link for 'Add New Member'. The table contains 15 rows of member information, each with 'Edit' and 'Del' links.

		Admin Name	Birthday	Home Phone	Email
Edit	Del	Anaya, Whitney	09/21	817-741-5334	
Edit	Del	Andrews, Allison	04/30	214-465-4497	aandrews@hotmail.com
Edit	Del	Baker, Brent	12/09	817-569-9354	
Edit	Del	Bannan, Josephine	06/11	817-421-2831	jbannan@att.net
Edit	Del	Bogosian, Judy	05/06	469-678-2941	
Edit	Del	Born, Pat	09/05	214-531-2941	
Edit	Del	Bostick, Daryl	03/07	817-741-2635	dbostick@earthlink.net
Edit	Del	Brock, Brenda	08/26	817-464-2884	bbrock@verizon.net
Edit	Del	Clenney, Nichole	09/21		
Edit	Del	Coker, Brandon	06/19	214-795-9791	bcoker@verizon.net
Edit	Del	 Coulson, Tara	05/05	469-442-0041	
Edit	Del	Counts, Haley	07/08	817-549-9267	
Edit	Del	Del Bosque, Rita	05/23	817-641-7285	rdelbosque@amazon.net
Edit	Del	Elliott-Laichak, Marlyn	12/30	972-668-9331	melliott-laichak@mail.net
Edit	Del	Feller, Vincent	12/20	214-561-3244	vfeller@pmail.net
Edit	Del	Guevara, Billy	09/26	817-685-3744	

Small Group Manager View

Dynamic Church Small Group Manager

Members Attendance Contacts Manage Your Team: New Testament Heros

Manage Your Team Member List Add New Member

	Admin Name	Birthday	Home Phone	Email
Edit Del	Nelson, Debi	07/15	214-695-9147	
Edit Del	Owens, Mary	07/17	214-635-8715	
Edit Del	Quanz, Daniel	08/08	817-569-2348	dquanz@earthlink.net
Edit Del	Redus, Joyce	12/01	817-569-4129	jredus@att.net
Edit Del	Reid, Martin	01/22	817-537-4437	mreid@mail.net
Edit Del	Spivey, Sonya	05/14	214-621-6311	
Edit Del	Stanhouse, Jeff	06/18	214-531-9857	

The small group manager can select any room/location that falls under his/her group

© Copyright 2004 Fellowship Technologies v0.9.1.8

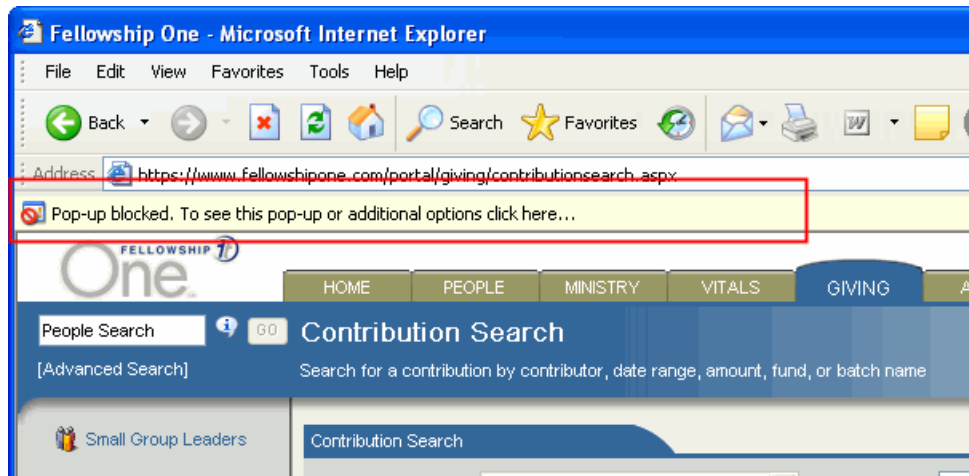
The difference between the two views depends upon the small group leader's staffing assignment. If staffed at the Room/Location level, the person will see the Small Group Leader view and if staffed at the group level, the person will see the Small Group Manager View. The Group Manager can see any group that resides under his or her activity grouping by selecting the group from the **Manage Your Team** drop-down list as shown in the image above.

Note: When a user creates a new account through the church website, it actually creates a new record in Fellowship One. You must merge the new record with the person's original record in Fellowship One before he or she will be able to view Group Manager.

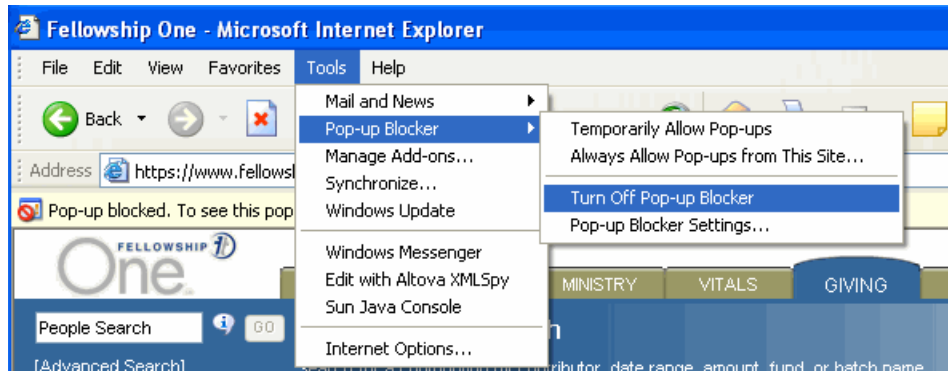
Why won't Small Group Manager launch?

Small Group Manager can be configured as a popup window on your church web site. If you have a popup blocker installed, it may prevent Small Group Manager from launching.

Windows XP Service Pack 2 included a security update to block all popup windows. When a popup is blocked, a yellow bar appears at the top of your Internet browser window as shown in the following image.



Click **Tools** and **Pop-up Blocker** in the menu options. Now choose **Turn Off Pop-up Blocker** to turn the blocker off while working on your church web site.



Note: Internet toolbars like Google, MSN, or Yahoo also install popup blockers. There is typically a button on the toolbar that allows you to bypass the blocker for certain popup windows. Read the documentation included with the toolbar to find out how to turn it off.

Ensure you turn off all popup blockers when working on your church web site.

Group Manager functions

Group Manager functions include the ability to do any of the following:

- Manage group membership
- Manage attendance
- Manage group contacts

Managing group membership

The Group Manager window displays a list of all current group members and their basic contact information. From this window, you can choose to edit any member's information, add a new member to the group, or remove a member from the group.

Editing information

You can and should edit basic contact information whenever appropriate.

To edit a member's information

1. Click the green **edit** button beside the name you want to work with. Certain fields become editable as shown in the following image.

		Admin Name	Birthday	Home Phone	Email		
<Edit	Del	Anaya, Whitney	09/21	817-741-5334			
<Edit	Del	Andrews, Allison	04/30	214-465-4497	aandrews@hotmail.com		
<Edit	Del	Baker, Brent	12/09	817-569-9354			
<Edit	Del	Bannan, Josephine	06/11	817-421-2831	jbannan@att.net		
<Edit	Del	Boqosian, Judy	05/06	469-678-2941			
<Save	Can	Del	<input type="checkbox"/>	Born, Pat	09/05	214 531 2941	
<Edit	Del	Bostick, Daryl	03/07	817-741-2635	dbostick@earthlink.net		

2. Make changes to any of the fields.

Note: The check box to the left of the member's name allows you to give that member administrative rights. This gives the member the same rights that you have. Designate administrators wisely as he or she will have access to a member's household communication information.

3. When you are finished making changes, click the **Save** button. Click **Can** to cancel your changes.

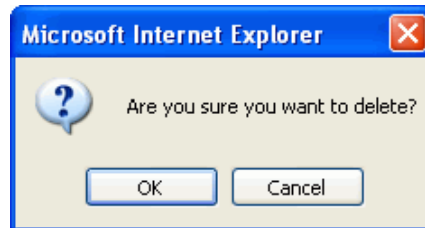
Removing a group member

When a member no longer attends your group, you can remove him/her from your list.

Note: Don't worry, this does not delete the person from the database, it just removes him/her from your group list.

To remove a group member

1. Click the **Del** beside the member you want to remove. A warning dialog box appears as shown below.



2. Click **OK**. The person is removed from your list.

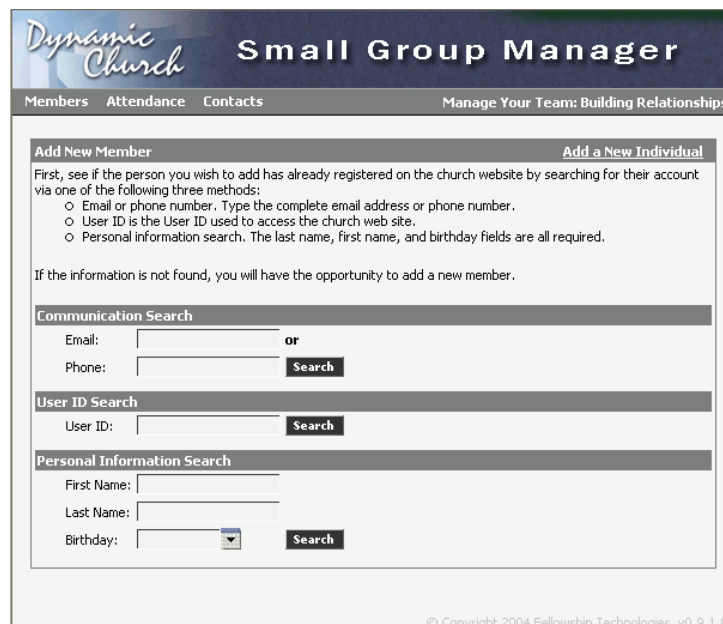
Adding a group member

Before you can add a member to your group, he or she must exist in the church database. To have someone added to the church database, have them create a user account on your church web site.

[INSERT DIRECTIONS HERE ON HOW TO CREATE AN ACCOUNT ON YOUR CHURCH WEB SITE]

To add a group member

1. Click the **Add new member** link in the upper-right corner of your group list. The Add New Member form appears.



2. Type any of the following to find the person:

- **Email**—the email address the member used to create his or her user account.
 - **Phone**—the primary phone number for the household.
 - **User ID**—the user ID the member created when he or she created a user account.
 - **First Name, Last Name, Birthday**—if you choose to search by these parameters, you must include something in each field.
3. Click **Search**. The household information appears as shown below.

The screenshot shows the 'Dynamic Church Small Group Manager' interface. At the top, there is a navigation bar with 'Members', 'Attendance', and 'Contacts' on the left, and 'Manage Your Team: Building Relationships' on the right. The main content area is titled 'Individual Profile' and displays the following information:

Name: Jeff Coulson (02/28)
 Address: 5605 N. MacArthur Irving, 75038 TX
 Home Number: 469-442-0041
 Email:
 Gender:
 Marital Status:
 Date of Birth 02/28

On the right side of the profile, there is a house icon followed by 'Jeff and Tara Coulson' and a link '[Add New Household Member]'. Below this is a table with the following data:

Name	Birthday	Grp Mem
Jeff Coulson	02/28	[Add]
Tara Coulson	05/05	[Yes]

4. Click **Add** beside any household member to add to your group.
5. Click the **Members** menu option to go back to your group list.

Viewing household and contact information

Once you have added a member to your group, you can see his or her contact information at any time. Click on the person's name to view the information. Click **Members** to go back to your group list.

Managing your group attendance

With Group Manager, you can post attendance and view past attendance to help you track your group members.

Recording attendance

You will be able to post attendance for about 60 days after a meeting has occurred, but you will not be able to post attendance for future dates.

To record attendance

1. Click the **Attendance** menu option. The Post Attendance window appears.

Dynamic Church Small Group Manager

Members Attendance Contacts Manage Your Team: Building Relationships

Post Attendance

Select All

<input type="checkbox"/> Anaya, Whitney	<input type="checkbox"/> Coker, Brandon	<input type="checkbox"/> Hubbard, Al
<input type="checkbox"/> Andrews, Allison	<input type="checkbox"/> Coulson, Jeff	<input type="checkbox"/> Jones, Laura
<input type="checkbox"/> Baker, Brent	<input type="checkbox"/> Coulson, Tara	<input type="checkbox"/> Ocasio, Allison
<input type="checkbox"/> Bannan, Josephine	<input type="checkbox"/> Counts, Haley	<input type="checkbox"/> Ocasio, Colby
<input type="checkbox"/> Bogosian, Judy	<input type="checkbox"/> Del Bosque, Rita	<input type="checkbox"/> Slay, Judy
<input type="checkbox"/> Born, Pat	<input type="checkbox"/> Elliott-Laichak, Marlyn	<input type="checkbox"/> Smalley, Tina
<input type="checkbox"/> Bostick, Daryl	<input type="checkbox"/> Feller, Vincent	<input type="checkbox"/> Smith, Rick
<input type="checkbox"/> Brock, Brenda	<input type="checkbox"/> Guevara, Billy	<input type="checkbox"/> Weersing, Sandra
<input type="checkbox"/> Clenney, Nichole	<input type="checkbox"/> Harris, Joshua	

Select Reporting Period: 10/29/2004

Activity Meeting Date:

Meeting Note:

Post Attendance

© Copyright 2004 Fellowship Technologies v0.9.1.8

2. Select the check box beside everyone who attended the group meeting.
3. Select a date from the **Select Reporting Period** drop-down list.

Note: Depending upon how your small groups activity was setup, the reporting period may only be one date per week. Select the date for the reporting period and then type the actual meeting date in the **Activity Meeting Date** field.

4. Type an actual meeting date in the **Activity Meeting Date** field.
5. Type any meeting notes or minutes in the **Meeting Notes** field.
6. Click **Post Attendance**. The attendance summary appears.

Viewing past attendance

You can quickly see a view of the past attendance of your group members, even those you have removed from your people list.

To view past attendance

1. Hold your mouse over the **Attendance** menu option until the drop-down menu appears. Click **View Attendance**. The attendance summary appears.

<p>Note: Currently, you are not able to see a summary of your meeting notes. Request report number M7000 - Small Groups Attendance from the church office to see notes.</p>
--

2. Click **Members** to go back to your member list.

Managing group contacts

Group Manager allows you and other group members to email each other individually or to email the entire group using its built-in email functionality.

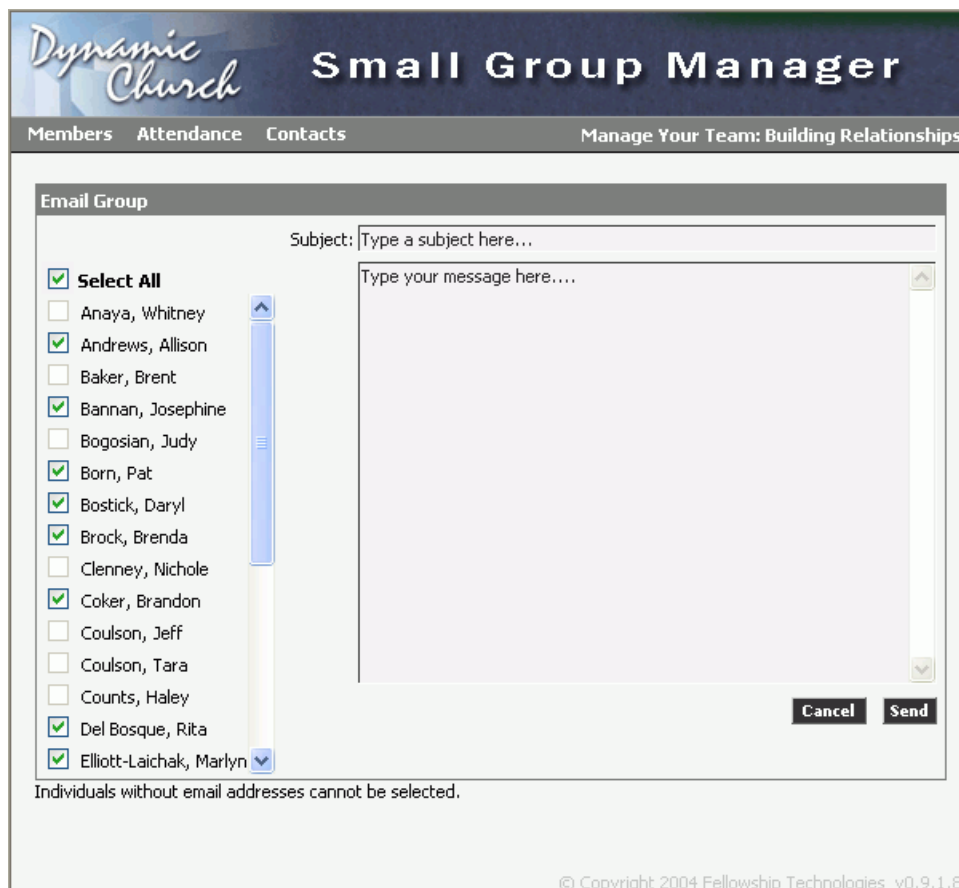
Additionally, there is also a contact request area where you will be able to see the names and contact information for anyone who has requested more information about your small group through the church web site. When a person browses through the church web site, he or she can search for available groups and select groups of interest. You will receive an email notifying you of the contact as well.

Emailing your group

You can email one, several, or all the people in your group list.

To email your group

1. Hold your mouse over the **Contacts** menu option until the drop-down menu appears. Select **Email Group**. The Email Group window appears.



The screenshot shows the 'Dynamic Church Small Group Manager' interface. At the top, there is a navigation bar with 'Members', 'Attendance', and 'Contacts' options. The 'Contacts' option is highlighted, and a drop-down menu is open, showing 'Email Group' as the selected option. Below the navigation bar, the 'Email Group' window is displayed. It features a 'Subject:' field with the placeholder text 'Type a subject here...'. Below the subject field is a large text area for the message, with the placeholder text 'Type your message here...'. To the left of the message area is a list of names with checkboxes next to them. The 'Select All' checkbox is checked. The list includes: Anaya, Whitney; Andrews, Allison; Baker, Brent; Bannan, Josephine; Bogosian, Judy; Born, Pat; Bostick, Daryl; Brock, Brenda; Clenney, Nichole; Coker, Brandon; Coulson, Jeff; Coulson, Tara; Counts, Haley; Del Bosque, Rita; and Elliott-Laichak, Marlyn. At the bottom of the window, there are 'Cancel' and 'Send' buttons. A small note at the bottom of the window states: 'Individuals without email addresses cannot be selected.'

2. Choose **Select All** or select the check box beside each individual you want to email. (Only individuals who have an email address on file can be selected.)
3. Type the **subject** and then the message. When the email is complete, click **Send**. A confirmation message appears above the Email Group box.
4. Click **Members** to return to the members list.

Viewing web site generated contacts

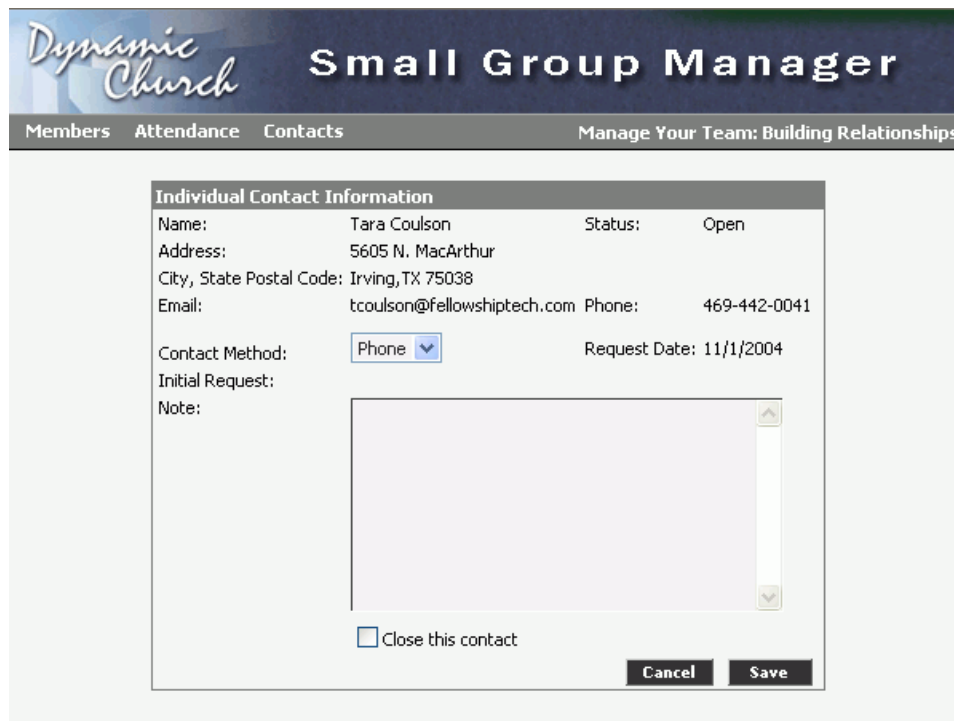
Anyone who has requested information about your small group appears on your contact list. You are responsible for contacting the people who appear on this list with the details of your small group.

To view and work contacts

1. Hold your mouse over the **Contacts** menu option until a drop-down menu appears. Click **View Contacts**. The Contact List appears.



2. Click on the underlined name to see the individual's contact information.



3. Contact the person.
4. Indicate how you contacted the person by selecting the method from the **Contact Method** drop-down list.
5. Type any notes in the **Note** field.
6. If the contact is complete, click the **Close this contact** check box.

Note: Once you select **Close this contact**, you will not be able to add additional notes. The contact disappears off your list. Do not select this check box until you are ready to completely close the contact.

7. Click **Save**.