CHURCH360°

Members

Training Manual

Concordia Technology Solutions

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Getting Started

This article provides an overview of key ideas and concepts to know, as well as some of the features available in Church360 Members.

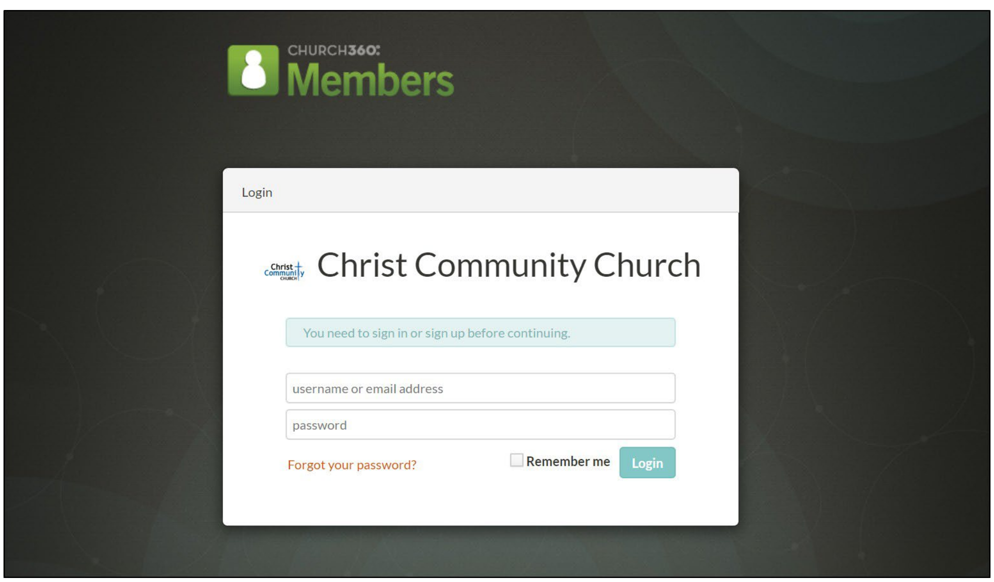
Sign-In

After purchasing your Church360° Members subscription, you will receive an email from our team with a link to set up your account. This link will open a setup page for your Church360° Members site.

On the setup page, enter your name, email address, username, and password. If desired, you can enter in some information about your church, such as the address, phone number, and time zone. If you skip this step, an administrator can edit the church's information later under the General Settings page by clicking on the gear icon on the Primary Navigation.

Once your user account has been created, you will be able to log in using either the username or email address that you provided along with your password.

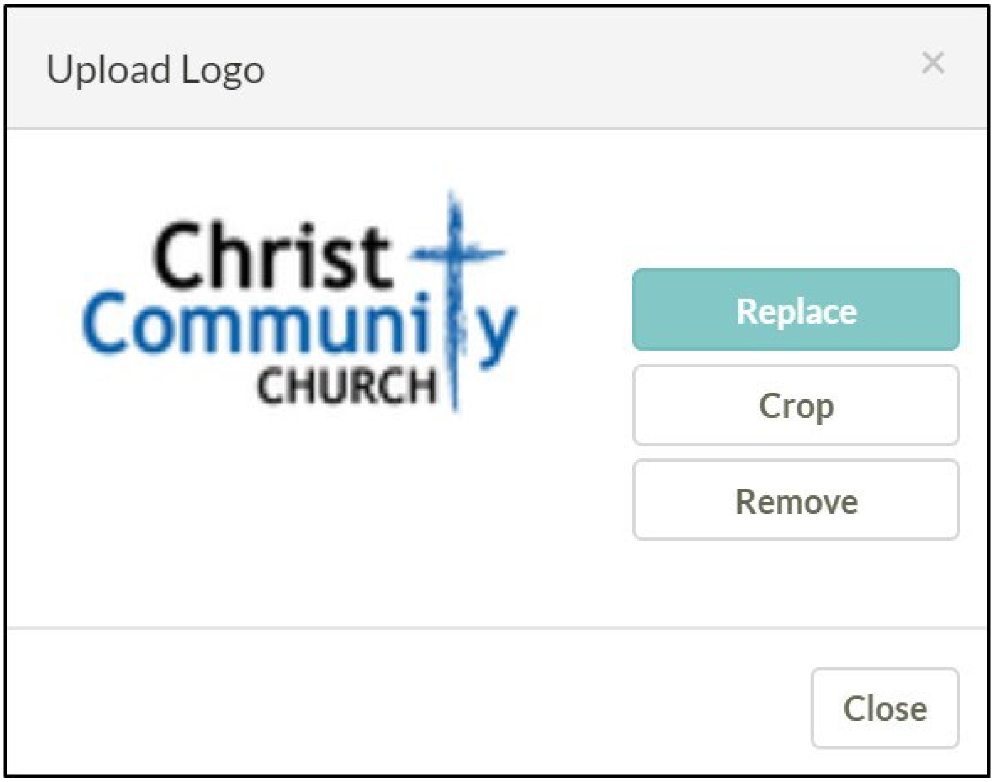
If you forget your password or wish to change it, you can click on the "Forgot your password?" link on the Login page. Enter your email address and check that email account for an email containing instructions on how to change your password.



Add Your Logo

You can add in your custom church logo to your site.

1. Click on the image holder in the top left corner.
2. Click the "Upload" button.
3. Find and select your logo in your file folders.
4. Click the "Crop" button to change the spacing of your image.
5. Once your image is loaded and correctly cropped, click "Close."



Primary Navigation

After you log in to Church360º Members, you will need to become familiar with the different features and utilities that the site offers, to help you manage your church.

The Primary Navigation will display different options depending on who is logged in and what and to what Roles they are assigned. For more information on Roles, check our Roles article.

The Primary Navigation is located on the top of your screen, no matter what page you are. From this menu, you can access all of the different pages on Church360° Members: People, Events, Attendance, Offerings, and Reports. On the very right of the Primary Navigation are icons to access (from left to right)your message center, settings, and personal profile.

In this manual, references to a view (such as the People view or Offerings view) refer to the different links to pages on the Primary Navigation. For example, clicking on People will take you to the People view.

Download, Print, and Save Report Features

The Download, Print, and Save Report buttons will be in the top right corner of the screen across most views.

Download appears in every view. The specific options will change, depending on your selected view. Some views may be only downloaded to PDF, while other may be downloaded to Word, CSV, or Excel. Details for each download type will be provided later in this manual.

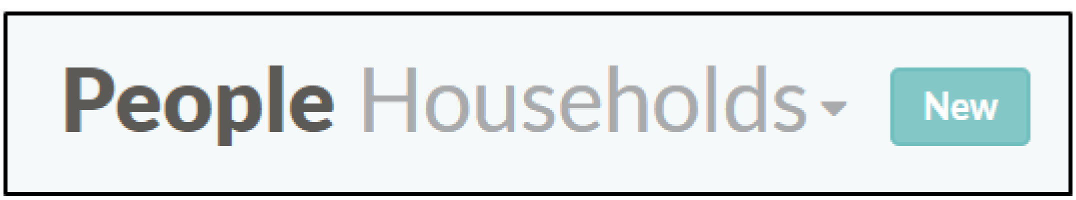
Print allows you to print your current table view as it appears on the screen.

Save Report will save the columns and layout of your current view. You can access saved reports at any time by clicking on the Reports page in the Primary Navigation.

Headings

Headings refer to the bold text at the top of the page.

In the image below, "People"and "Households" are the headings.



Modes

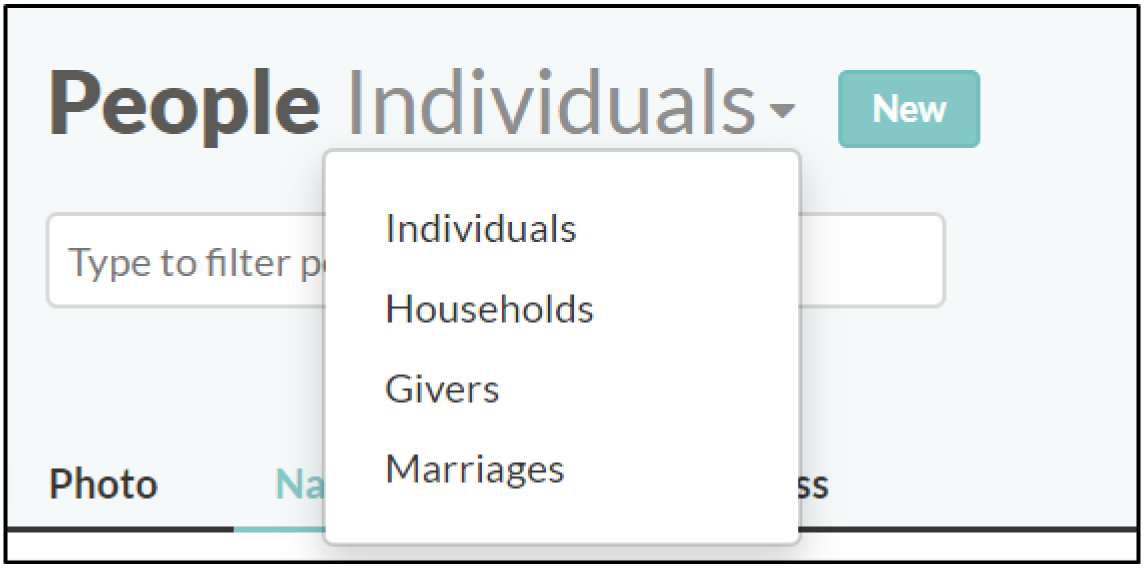
Modes are ways of viewing and categorizing people's information in Church360° Members. Each mode is optimized to help you perform a different type of task with Church360° Members.

There are four modes within the People view:

- Individuals Mode

- Households Mode
- Givers Mode
- Marriages Mode

Each mode has a different variety of selectable and sortable columns.



Beacons

Beacons are orange flashing lights used to indicate a helpful hint or tip. Beacons are used throughout Church360° Members to indicate a helpful tip or suggested next action. Click on the Beacon symbol to read about the tip.

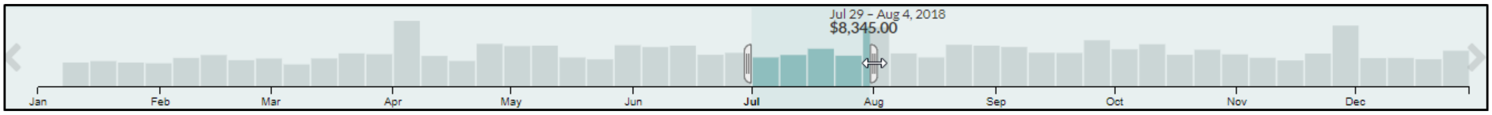
Note: After you click on the symbol, the Beacon will disappear, and that user will not see it again.

Selecting Dates

In Church360° Members, there are multiple ways to select dates that you would like to view on a report.

The Date Range Selector (shown in the image below) allows you to select a specific range of dates to view on a report. This feature is used in areas like the Offerings view.

- The Date Picker allows you to select one single day that you would like to view on a report. You will use the Date Picker on views such as Attendance.
- The Partial Date Picker is usually used for those "anniversary" type events that might be use when putting together a monthly church newsletter calendar.



Drawer & Drop-Down Menus

In Church360° Members, there area couple of different options for you to choose how much information is displayed in your reports.

A Drawer (shown below) is a menu that can be accessed by clicking on the three horizontal lines (hamburger symbol). The drawer hides information such as Smart Groups criteria.

A Drop-Down is a menu that can be accessed by clicking on a downward arrow. Drop-down menus hide a small group of selectable information.

Envelope Numbers

Envelope Numbers are numbers that are assigned to the envelopes of giving units in the congregation for financial giving. Envelope numbers are not required to enter offerings into Church360° Members.

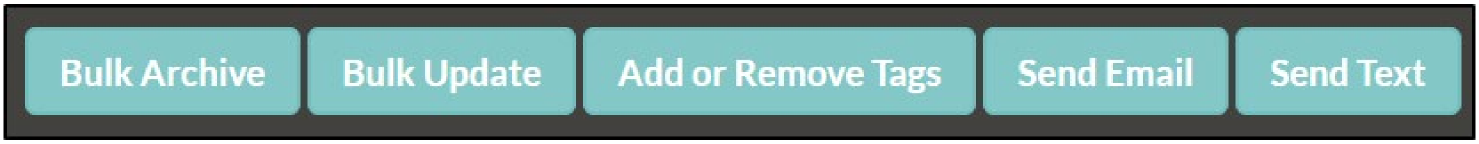
Giving Units

A Giving Unit is an individual or group of people whose financial contributions are tracked together.

Utilities

Utilities are actions that apply to the entire page in its current state (what is visible), respecting any Smart Groups that are selected.

On the People view, utilities will take into account manual selection when applicable.



Information Center

The Information Center icon located in the bottom right corner of every page allows you to search for help articles on any of the major features in Church360° Members.

Clicking on the Help icon (the small blue circle containing a white "i") will open a small window where you can search for Help articles in our Help system. You can ask a question, such as "How do I create a new batch of offerings?" or search by keyword, such as "attendance."

1. Click the Help icon, which is located in the bottom right corner of every page.
2. Type in your search criteria—a question,keyword, or topic. A list of help articles related to your search will appear. Clicking on an article will open the document in that same popup window.
3. If you need more information or wish to enlarge the document, click "See original article" at the bottom of the article. This action will open our help center, where you can view the original article as well as browse additional help documents.

Feedback

The Help icon located in the bottom right corner of every page allows you to send feedback to us to help improve Church360° Members. Clicking on the Help icon (the small blue circle containing a white "i") will open a small window where you can search for Help articles or send us a message.

1. Click on the Help icon, which is located in the bottom right corner of every page.
2. Click "Send us a Message" in the bottom right corner of the new window.
3. Type your question, suggestion, or feedback into the text box.
4. Click the "Send" button.
5. We'll get back to you as soon as possible!

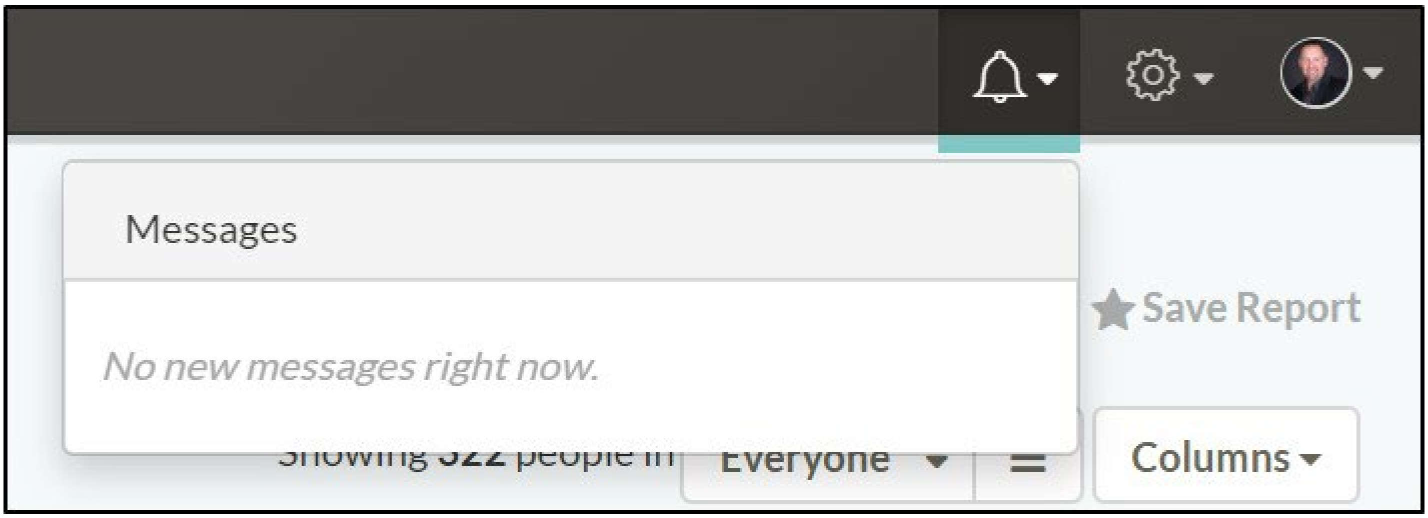
Message Center

The message center is located on the Primary Navigation at the top of the screen. You can access this by clicking the bell icon.

Messages notify you when documents such as your contribution statements or church directories are ready to be downloaded.

Messages work on a per-user basis; each user has control over his or her own message center. When you hide a message, it only affects your username.

1. When you have a new message, a blue dot will appear by the bell icon. Click on the bell icon to view your new message.
2. To delete a message, click on the "x" next to the message. Once a message is deleted, it cannot be recovered.



Modes

There are four modes within the People view. Each mode has a different variety of selectable and sortable columns.

Individual Mode

Individual Mode displays basic information about every individual in your database.

Each individual person is listed on a separate line.

If you click on an individuals name from within Individuals mode, it will take you to that person's individual profile.

Household Mode

Household mode displays basic information about every individual in your database.

Each household is listed on a separate line.

If you click on a household name from within Households mode, it will take you to that household's profile.

Givers Mode

Givers mode displays information about every giving unit in your database.

Each giving unit is listed on a separate line.

You can access individual profiles from within the Givers mode by clicking on any individual's name.

The following columns can be viewed in the Givers mode:

- Giving unit name
- Address
- Envelope number
- Giving unit type

Note: Each individual in your database is automatically considered to be a separate giver, unless you have marked two people as contributing jointly from within Envelopes.

Marriages Mode

Marriages mode displays information about every married couple in your database.

Each couple is listed on a separate line.

You can access individual profiles from within the Givers mode by clicking on any individual's name.

The following columns can be viewed in the Marriages mode:

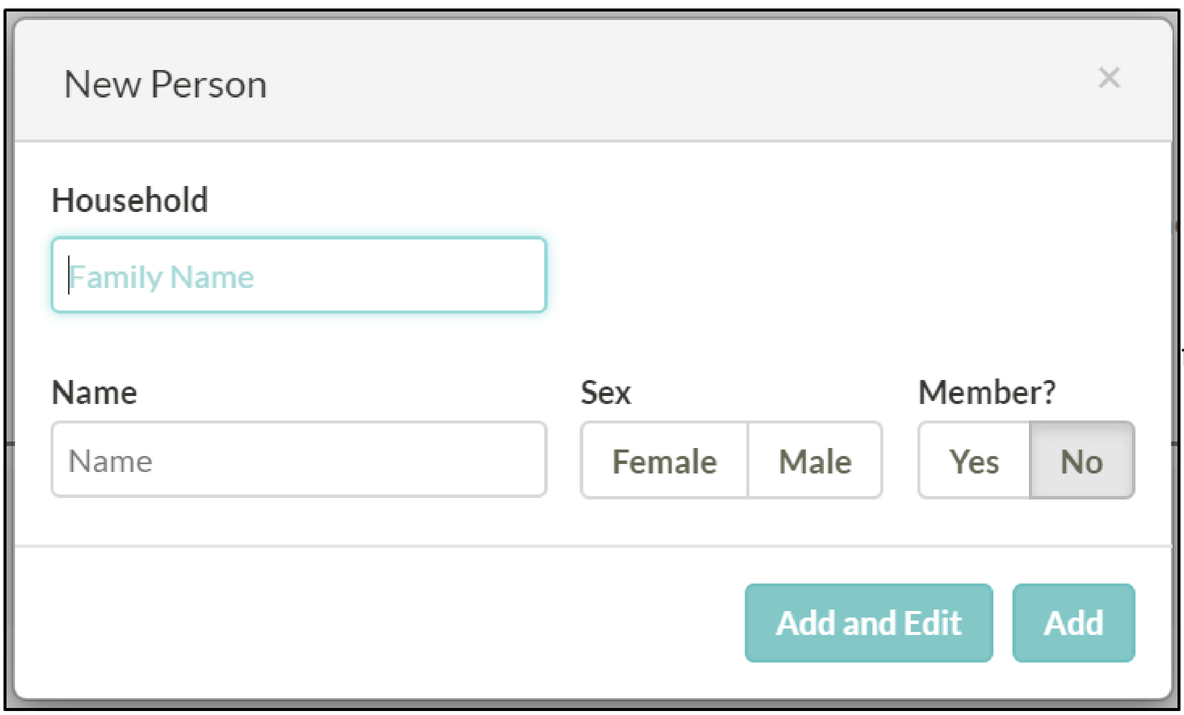
- Married People's Names
- Address
- Contributes Jointly
- Married For
- Wedding Anniversary

Adding new People and Households

The easiest way to add new people into Church360º Members is to create their individual profile from the People view.

This feature allows you to add a person to your records, including specific information, such as membership status and personal information.

1. In the People mode, click the "New" button to the right of the People/Households heading. A new window will pop up.
2. Input the information for the person you are adding. Family name (last name), first name, sex, and member status are the only required fields.
3. To finish creating the profile and return to the People view, click "Add." If the person does not belong to an existing household, a household record will automatically be created.
4. To create a profile and add more information, click "Add and Edit." The person's profile will open, and you will be able to continue adding and editing the information.



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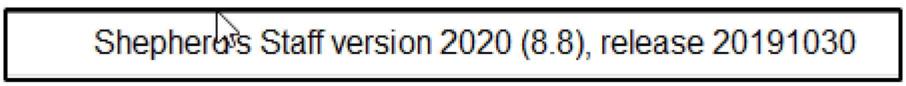
Preparing your Shepherd's Staff Database for Upload

Church360° Members offers a utility to import your Shepherd's Staff database to your site.

The version of your Shepherd's Staff database will affect how to prepare it prior to upload.

If you do not know your Shepherd's Staff version, you can find this information on the Main Menu (with the stained glass window) on the very bottom of the window.

There should be the Shepherd's Staff year, the version in parenthesis, and a release number.



Versions 8.1 or older

Customers with older software can call CTS support to update their database for your site. The technician will then log into your computer, take a copy of your database, and update the database for you. They will then send you an import summary after the upload completes.

Version 8.2 to 8.7

These databases are most compatible with the current importer and do not need to be prepared. Please proceed to import your data to your site.

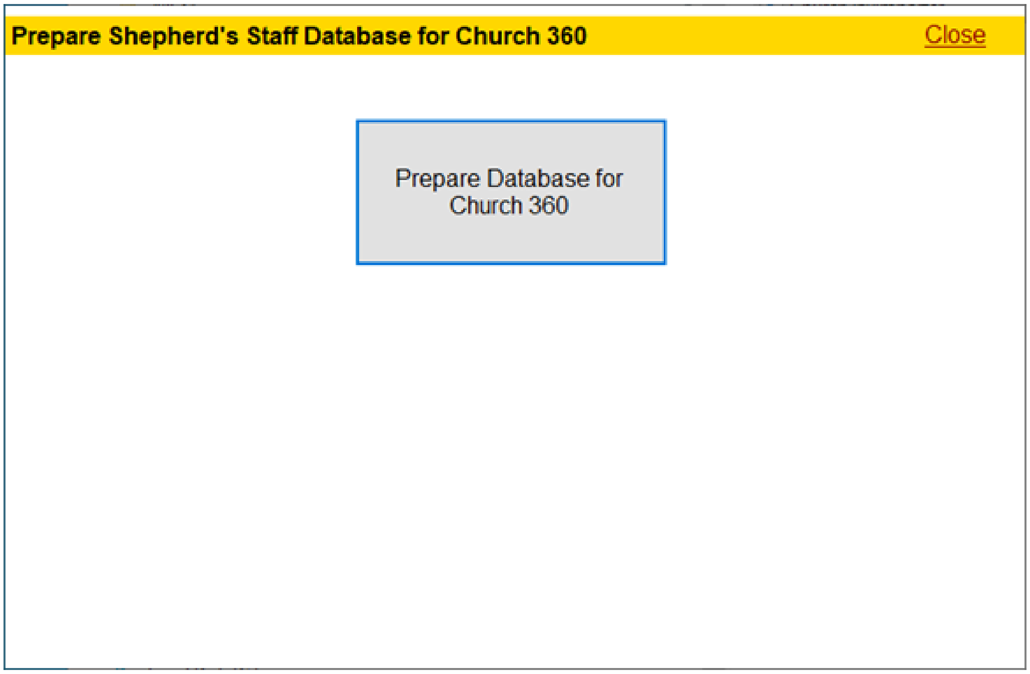
Version 8.8 or newer

Due to differences in infrastructure between the two software, a small utility must be run to allow data to be converted to your Church360° site.

To prepare your data,

- Download the Church360ImportUtility zip file at the bottom of this article.
- Right-click the folder and Extract all.
- Double click the application to run.
- Log in using your SYSADMIN credentials. If you do not know these credentials, please call CTS support to log in and run this utility for you.

- Click Prepare Database for Church360.
- After the utility is run, it will tell you the location of the database that was converted.



After the utility has been run, continue to the Upload button on your site to finish the import process.

Importing Data from Shepherd's Staff

If your church previously used Shepherd's Staff®, you can use a feature in Church360°® Members to import your Shepherd's Staff database. This import process can take up to two hours to complete if another user is using the importer.

Depending on the version of your Shepherd's Staff, you may need to prepare the database before starting the import process.

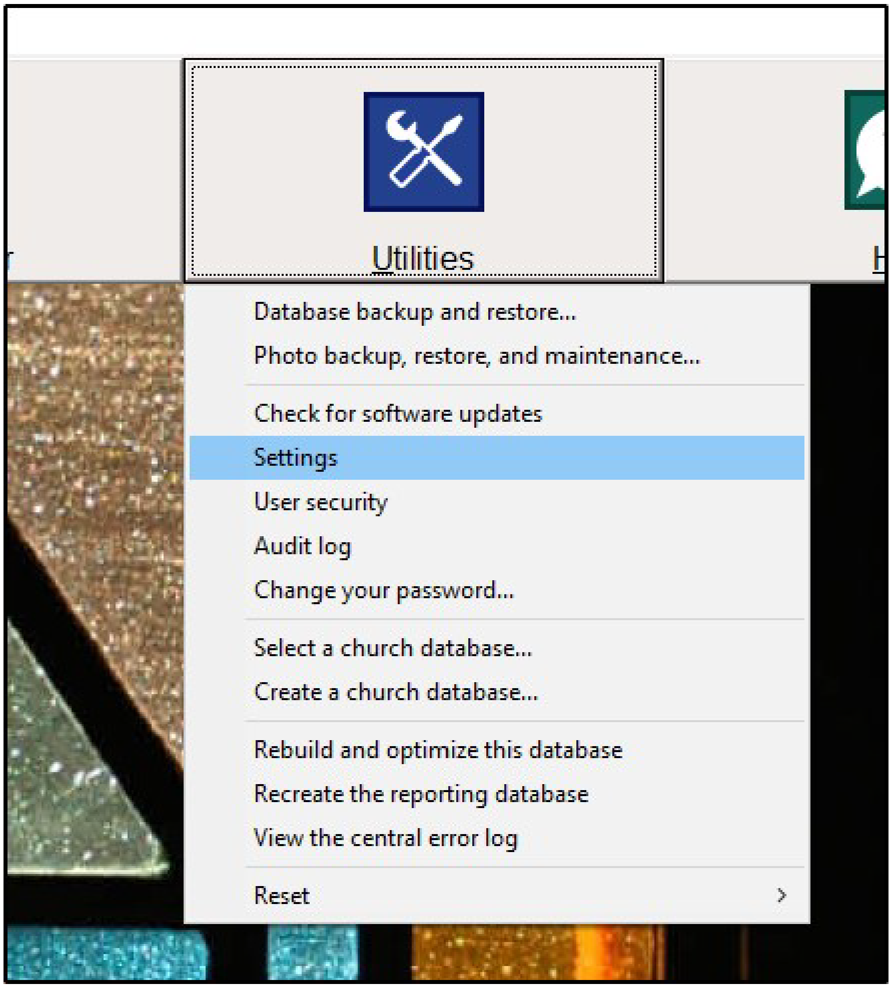
This importer converts almost all data in the Shepherd's Staff database and enters it in your Church360° Members account. The list of everything that can be imported can be found here. The list includes person and household information, offerings, events, and attendance.

Before you import the Shepherd's Staff database, you will need to know where to locate the database. In most cases, the database will be found at C:\ShepherdsStaff and the database is usually named Staff8.mdb or a similar variation.

If you are unsure of your database name or location, you should be able to find it easily if Shepherd's Staff is still installed on your computer.

To find your database name and location,

- Log into Shepherd's Staff and go to Utilities.
- Under Utilities, go to Settings.
- In the pop-up window, choose the Locations tab, which will show you where the database is located.



To import a Shepherd's Staff database into Church360º Members:

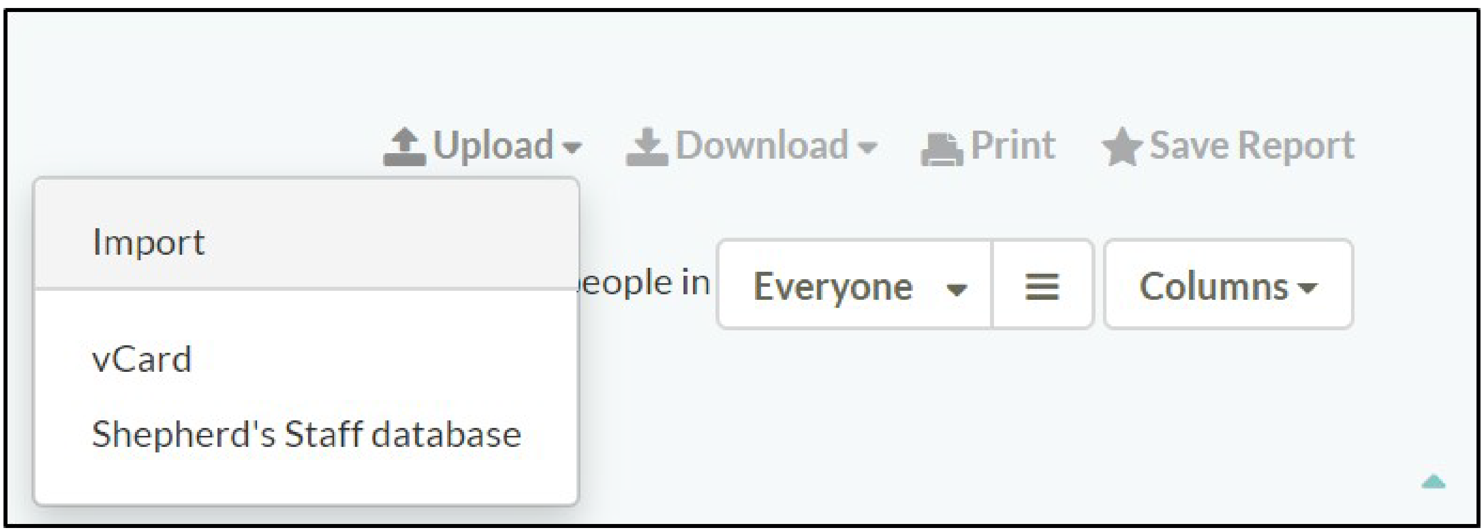
1. From the People view, click the "Upload" button in the upper right corner, and select "Shepherd's Staff database".
2. Click "Upload".
3. Navigate to the location of the database, select it, and click "Open". The database will then be uploaded and imported.

Importing a vCard

In People view, you have the option to import a vCard to easily create a profile for a new person in your site.

A vCard (.vcf file) is an electronic business card. It contains contact information for a person that can be uploaded and entered into Church360º Members to add anew profile with all of that person's information.

1. In the People view, click "Upload" in the top right corner and select "vCard." A popup window will appear.
2. Click "Choose File." Select the vCard.
3. Click the "Upload" button once your vCard has been selected.

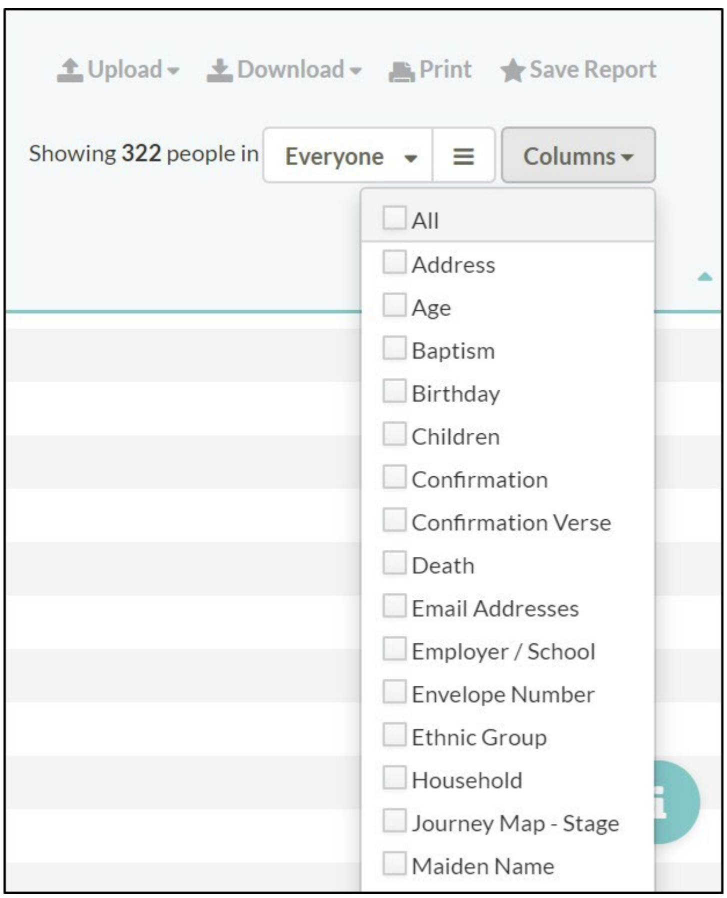


Selecting Columns

There are many columns that appear in the People view of Church360º Members. These columns show the various types of information about the households in your site, such as address, member names, email address, and phone number.

Columns can be shown or hidden. Hiding unnecessary columns keeps your list of households tidy and organized, reducing the amount of information on exported or printed lists.

1. In the People view, click the "Columns" drop-down menu.
2. Select the columns that you want to show by checking the box next to the column.
3. Deselect the columns that you want to hide by unchecking the box next to the column.
4. Church360° Members will automatically update your view.



Sorting View by Columns

Information in the People view can easily be sorted by column. Sorting by column can help to organize names, ages, and event dates. Sort columns before you print in order to make your reports more organized.

1. In the People view, click on the header of the column name that you wish to sort. In certain columns, help text will appear in parentheses to signify which value within the column is being sorted.
2. You may choose to sort in ascending or descending order. A small upward arrow signifies an ascending sort and the small downward pointing arrow signifies a descending sort. If you wish to sort by another column, click on that column name.

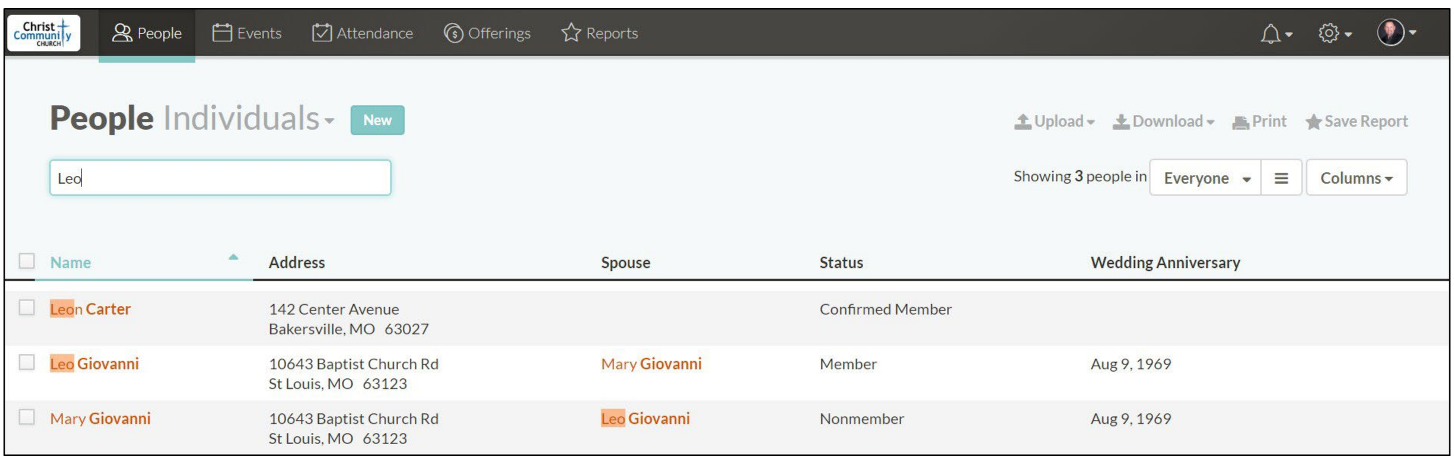
Note: You may sort by only one column at a time.

Searching with Filters

The search box in the People view filters by your search criteria to find particular profiles in your Church360º Members site.

This feature eliminates the need to scroll through your entire member list just to find information on one person.

1. In the People view, click on the white search box that contains the "Type to filter people" help text.
2. Type in all or part of the information you are searching for. Church360° Members will search across all columns to automatically update your list based on your search criteria.
3. Click on the individual or household name you were searching for to view the record.

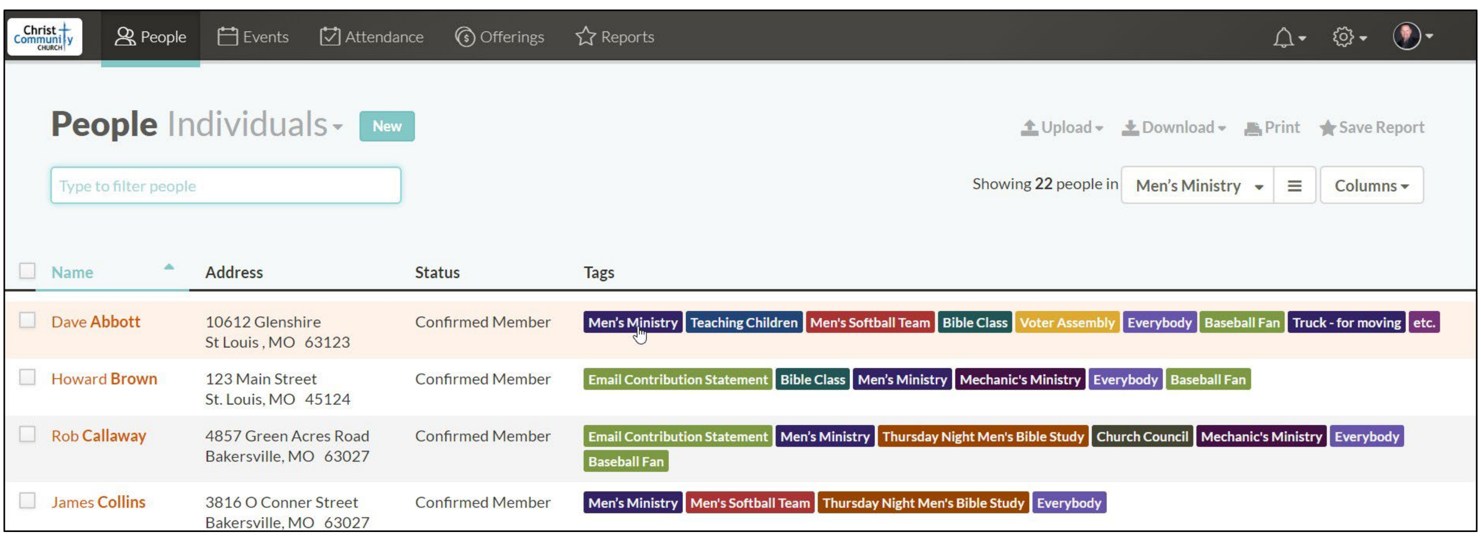


Filtering by Smart Groups

To filter the People view, you can use the Smart Groups feature to define your view to see only people who fit a certain set of criteria.

Smart Groups clusters people together based on their traits.

1. In the People view, select the Smart Group you wish to view by clicking on the Smart Groups drop-down menu.
2. Select an existing Smart Group to begin filtering the list. Church360° Members will automatically filter your view based on the Smart Groups criteria.
3. To create a new Smart Group or edit an existing Smart Group, click on the Smart Groups drawer (hamburger symbol) located to the right of the Smart Groups drop-down menu.
4. Clicking "Add trait" will allow you to narrow your Smart Group. You can add as many traits as you wish.
5. When your Smart Group is completed, click the "Save" button.



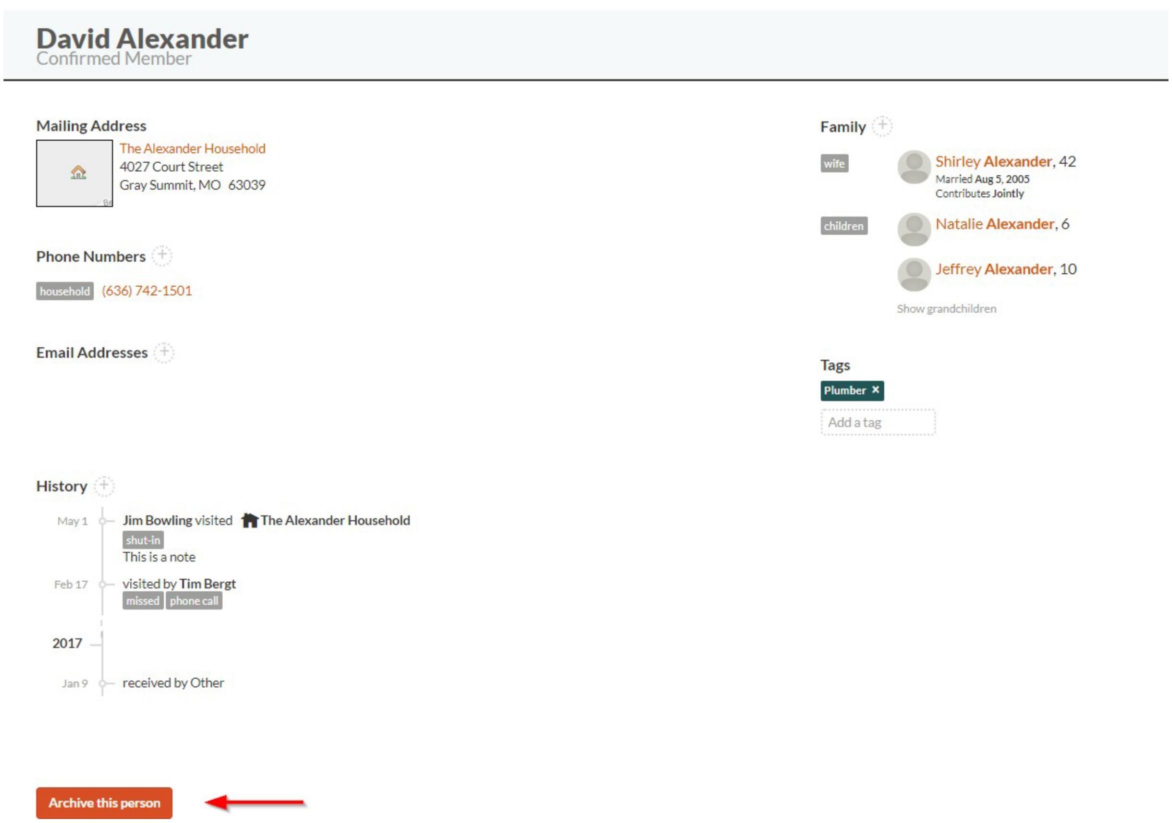
Archive People

At year end, after you've run your year end reports, you may consider archiving people in Church360 Members who have been removed, if you no longer want them appearing on reports, regardless of the smartgroup used.

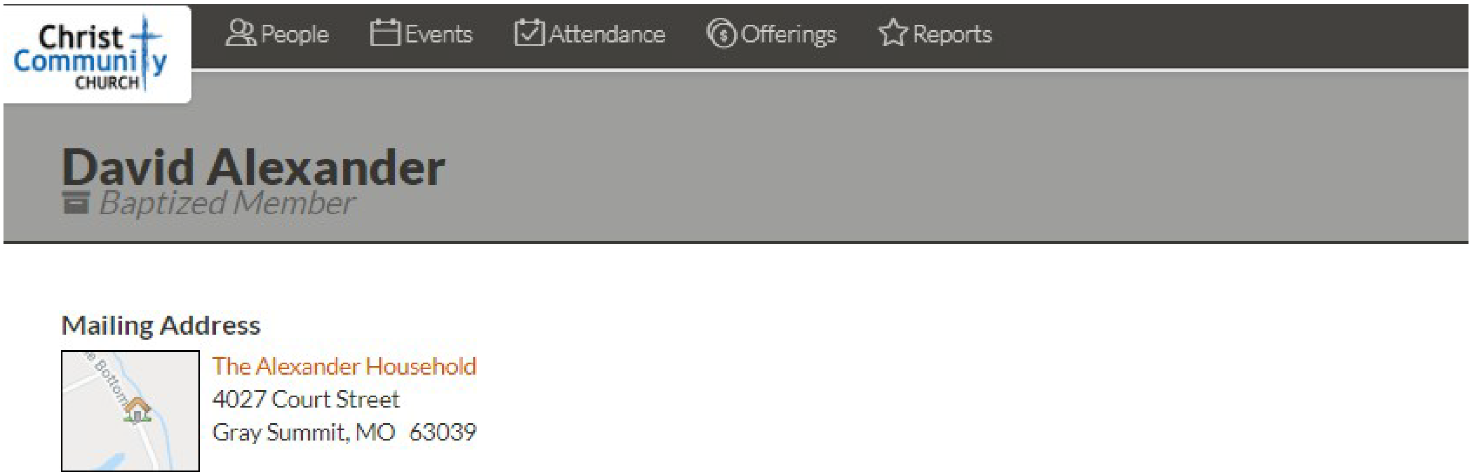
In the past, when considering people who were no longer part of your church who had person records in Church360 Members, you were left with only two options, either to filter around these people using smartgroups after marking them as removed, or to fully delete them from Church360 Members. However, with the introduction of the archive feature, Church360 Members allows you to place these people in a special section of Church360 Members that allows you to retain the person's information, but exclude them from most reports. (Archived people are still included in the figures for the Annual Report, Attendance and Contribution Summaries)

To archive people, follow these steps:

1. Open a person's record from the Individuals view in the People section.
2. At the bottom left corner of the page, click the button that says "Archive this person"
3. Confirm that you want to send this person to the Archived section of Church360 Members by clicking the "Archive Person" button.



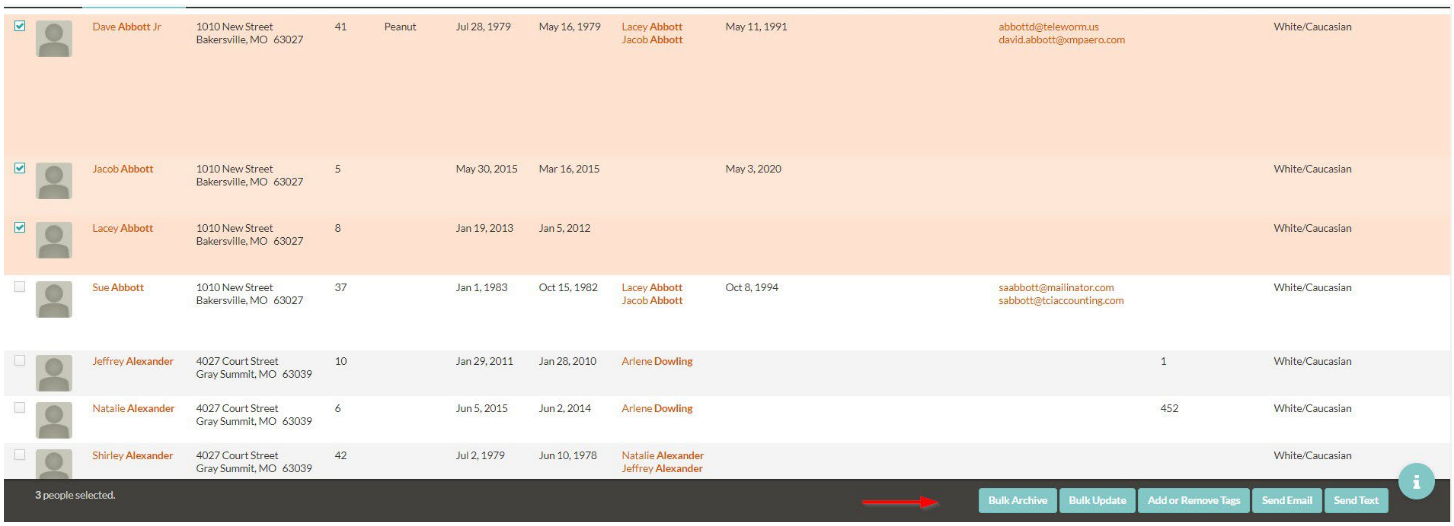
You will then be taken to the Archived version of that person's record. Data cannot be edited or added to an archived person's record. An archived record has a gray strip along the top, with the archive symbol next to a person's membership status in the top left.



Bulk Archive

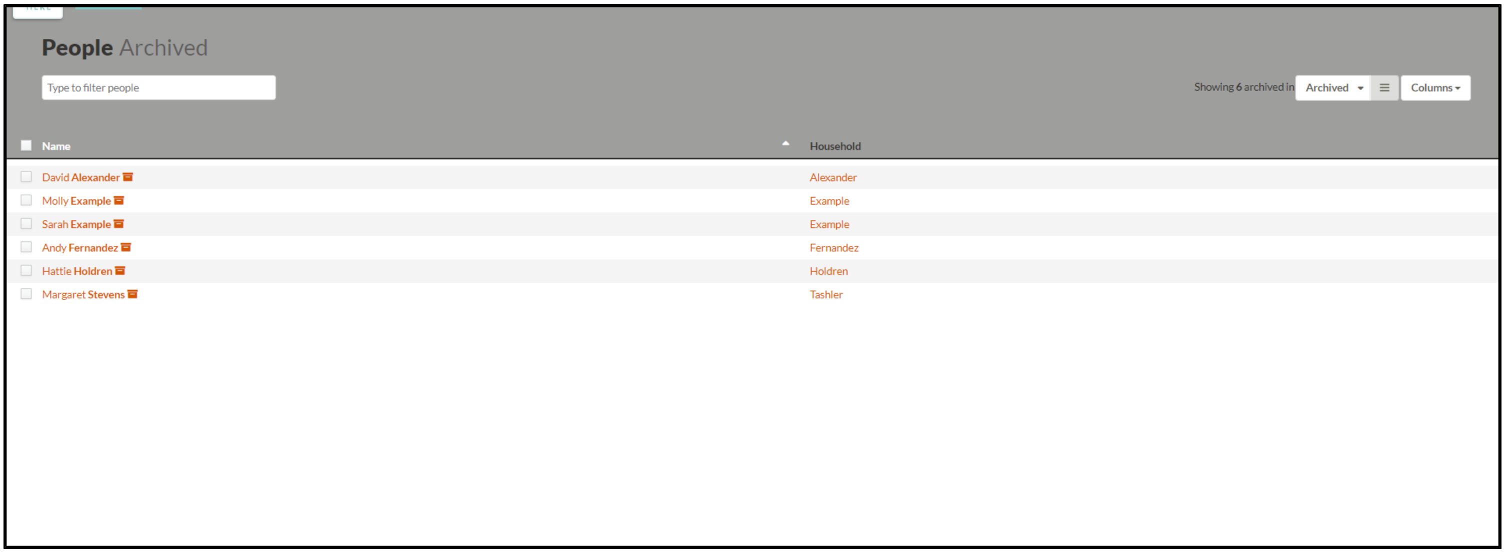
You may, at some point, wish to send multiple people to your person archive. In order to do this, you can use the Bulk Archive utility present in the person view.

1. From the People view, in the Individuals mode, select the profiles of the individuals you would like to archive by checking the box next to each person you'd like to archive.
2. Along the bottom of the page click the "Bulk Archive" button.
3. Confirm that you would like to send these people to the person archive.

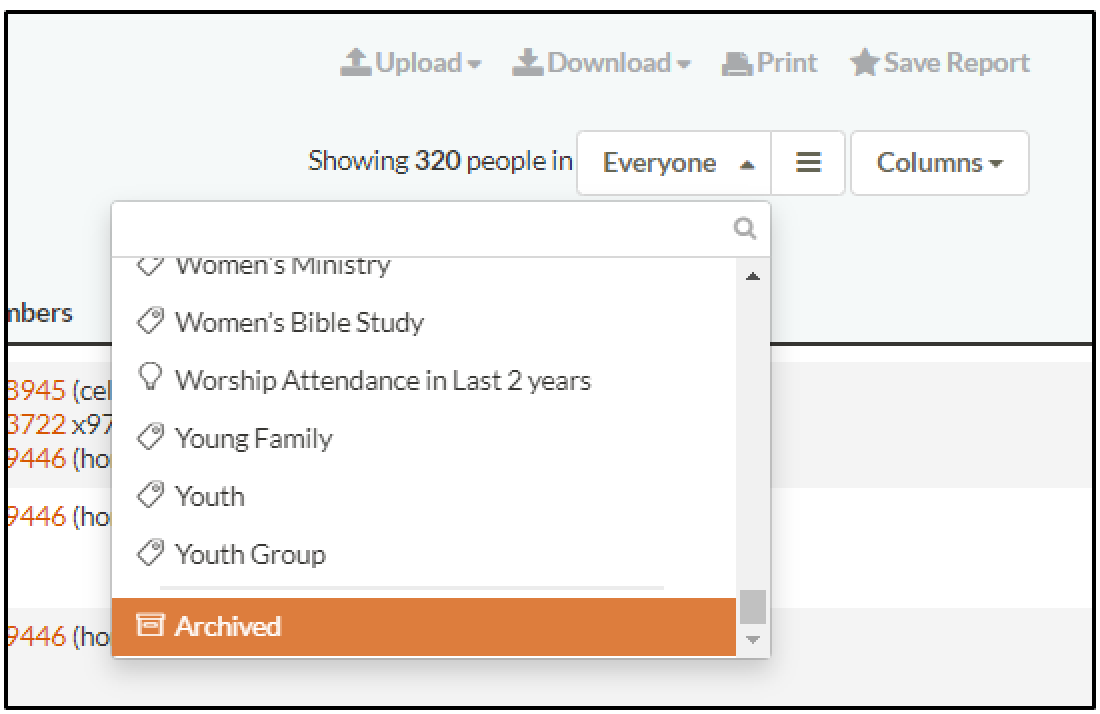


Archived View

When people have been marked as being archived in Church360° Members, their person record is moved to the Archived View. The archived view allows you to view these people's records, however, data cannot be edited within the archived view.



To access the Archived view, from People Individuals screen, select the "Archived" option from the box where you select what Smart Group or tag you want to view. This will take you in to the archived view. Then, you can click on the name of any person in the Archived view to view their record.



In an archived person record, you have two options. If you want to restore this person back to the regular part of Church360 Members, click the "Unarchive this person" button in the bottom left corner of the screen.

You can also permanently delete a person record if you click the Delete this person button. If you do this, you will be asked to type in the person's name to confirm their deletion. A deleted person cannot be brought back once deleted, so consider this carefully before deleting. If a person requests to be completely deleted from your site, this option can be utilized to stay in compliance with GDPR, which is a set of EU Privacy standards.

It is our recommendation, however, unless you are removing duplicate person records, that you do not delete person records, because if you need to pull a person's information for any reason, if that record has been deleted, it cannot be retrieved.

Church360° Members › People › People View

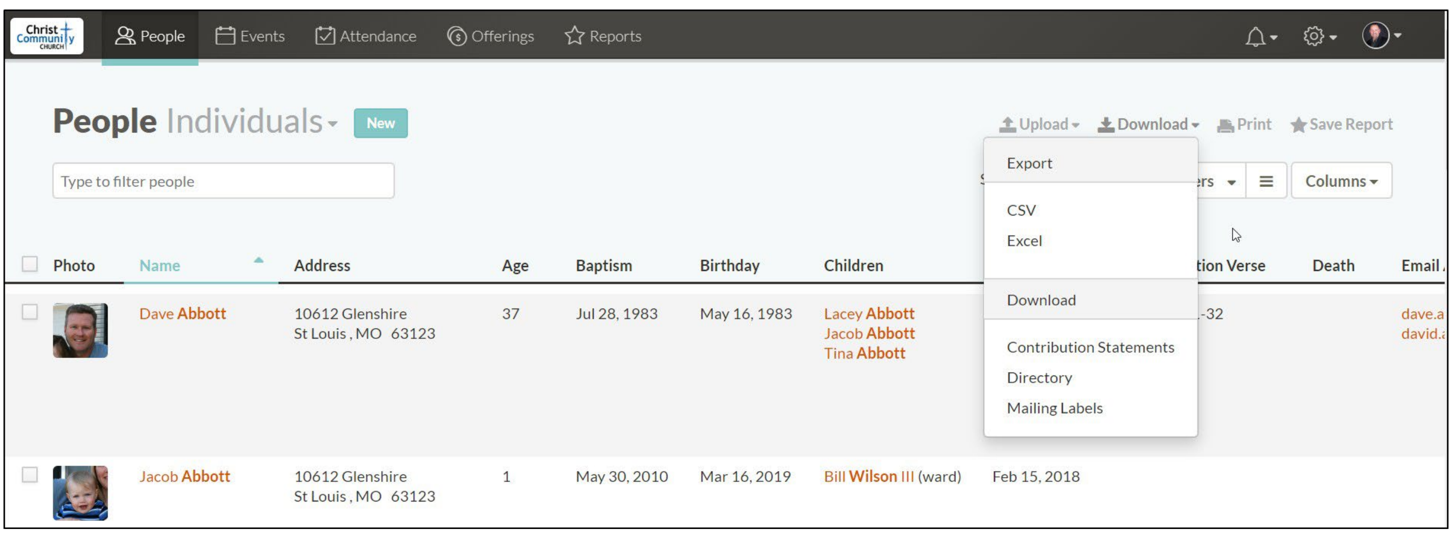
Exporting Lists to CSV or Excel from the People View

In the People view, you can export your list of people to CSV or Excel.

Exporting a list allows you to share an electronic or hard copy of your member information with people outside of Church360° Members.

1. In the People view, select the Smart Group you wish to export to CSV or Excel.
2. Select the columns you wish to appear in your CSV or Excel file by clicking on the Columns drop-down menu. Select or deselect columns by checking the box next to the column title.
3. Click "Download" at the top of the screen and select "CSV" or "Excel." Your download will begin automatically. The web browser you are using may ask if you would like to save the file to your computer.
4. Once the file is downloaded, click on the file name to open it.

Note: The web browser you are using will determine the process you need to take to open the CSV or Excel file.

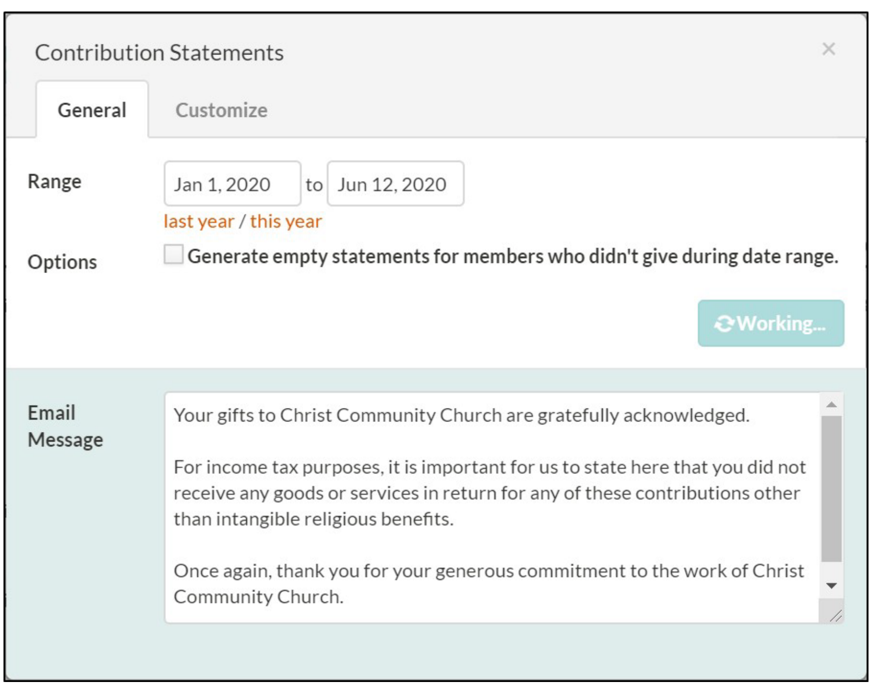


Exporting Contribution Statements to PDF

Contribution statements provide accurate, yearly information on your members' giving history. This information can be used as a record for charitable giving for your members' taxes.

Exporting contribution statements to PDF allows you to provide your members with a hard copy of this information.

1. Start out by navigating to "People : Givers" view.
2. Select the Smart Group whose contribution statements you wish to download to PDF.
3. Click "Download" at the top of the screen and select "Contribution Statements".
4. In the General tab, select the date range for the statements. If desired, check the box to print statements for users who have not given.
5. In the Customize tab, select whether or not you want to show pledges, whether or not you want to itemize the offerings, include a Federal ID, and update the IRS Message.
6. Download your contribution statements by clicking on the "Generate PDF" button. The button will let you know when it is working and will then turn green when the statements are ready.
7. Click on the green "Download" button and a PDF of the statements will appear in a new tab of your browser.
8. To save, click CTRL+S or "File" and "Save." To print, click CTRL+P or "File" and "Print."

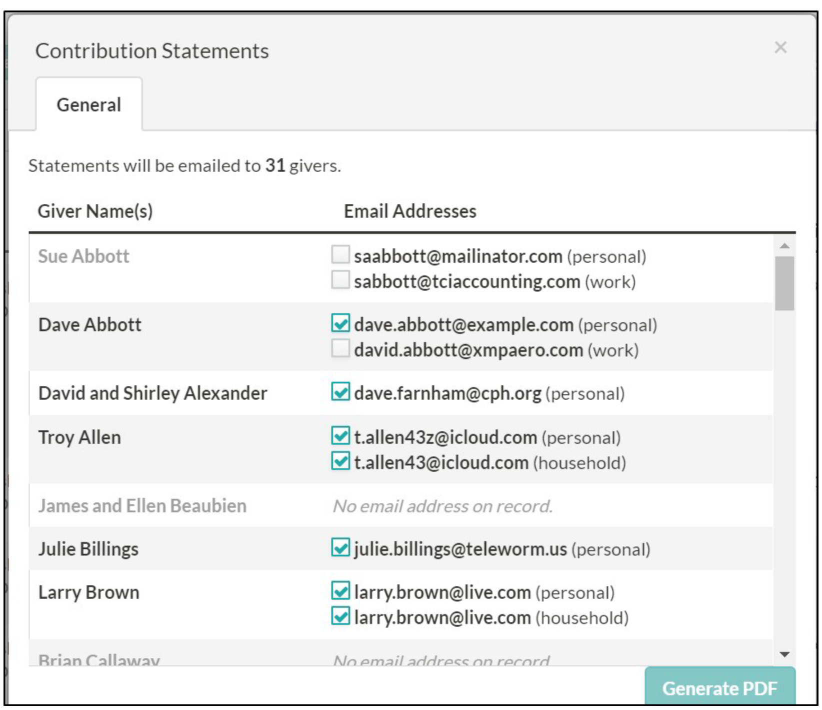


Emailing Contribution Statements

Contribution statements provide accurate, yearly information on your members' giving history. This information can be used as a record for charitable giving for your members'taxes.

Emailing Contribution Statements allows you to provide your members with this information in a quick and efficient manner.

1. Select the Smart Group whose contribution statements you wish to email.
2. Click "Download" at the top of the screen and select "Contribution Statements."
3. Select the date range for the statements. If desired, input your church's federal ID number for tax purposes.
4. Select whether or not you want to show pledges, print statements for users who have not given, print with church logo, or print fund totals by selecting or deselecting the check boxes next to these options.
5. Edit the body of your email message in the box at the bottom of the screen.
6. Click on the "Review and Email" button to prepare your statements for email. You will be taken to a screen listing the names and email addresses of the people you have selected.
7. Deselect any of the addresses you do not wish to email. Any undeliverable emails will be indicated by an alert signal and automatically deselected.
8. Once you have confirmed your list, click "Send." The list will be sent to your default email server.

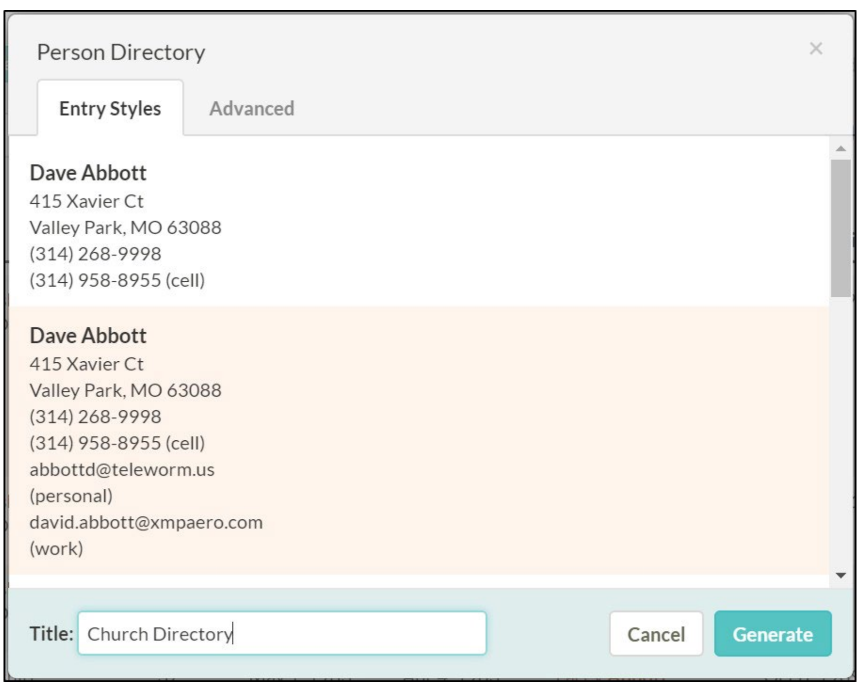


Exporting Church Directory to Word

Directories are a helpful resource for every church. Church360° Members allows you to create a directory with the information for individuals or households according to your needs.

The only difference between the Individual and Household Entry Styles is the inclusion of all the family members names within the household and the denoting which phone numbers or email addresses belong to whom.

1. Select the Smart Group you wish to have printed in your directory.
2. Click "Download" and select "Directory".
3. Select your desired entry style from the Entry Styles.
4. In the Advanced tab, select whether or not you would like to include unlisted contact information.
5. Select your "Group by" preferences, if you wish to create a grouped directory.
6. Enter the title for your directory in the text box at the bottom of the window.
7. Proceed to the "Download" tab and click "Generate" at the bottom of the screen. The button will change color from blue to green once your directory is ready for download.
8. Click on the green "Download" button,and your file will automatically begin to download. The web browser you are using may ask if you would like to save the file to your computer.
9. Once the file is downloaded, click on the file name to open it in Microsoft Word.

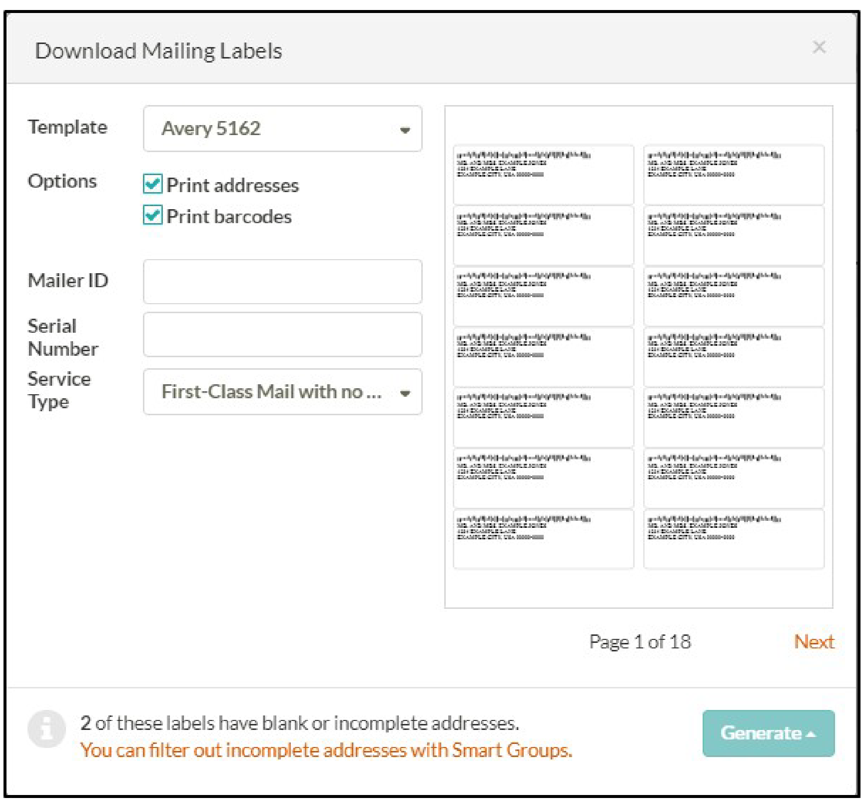


Exporting Mailing Labels for Individuals

If you would like to create mailing labels for each individual in your congregation, export mailing labels from the Individuals mode.

Across all modes, mailing labels can be exported for specific Smart Groups.

1. Select the Smart Group whose Mailing Labels you wish to export to PDF or Word.
2. Click "Download" at the top of the screen and select "Mailing Labels."
3. Choose the mailing label template by selecting the desired option from the drop-down menu.
4. Select whether or not you desire to print addresses.
5. Select whether or not you desire to print barcodes. If you choose to print barcodes,you will be prompted to enter a MailerID, Serial Number, and Service Type.
6. Click the "Generate" button. You will be prompted to select the file format (PDF or Microsoft Word). After selecting the file format, the box will change color to let you know it is working. When the labels are ready, the "Download"button will turn green.
7. Click on the green "Download" button,and your file will automatically begin to download.
8. Once the file is downloaded, click on the filename to open it.

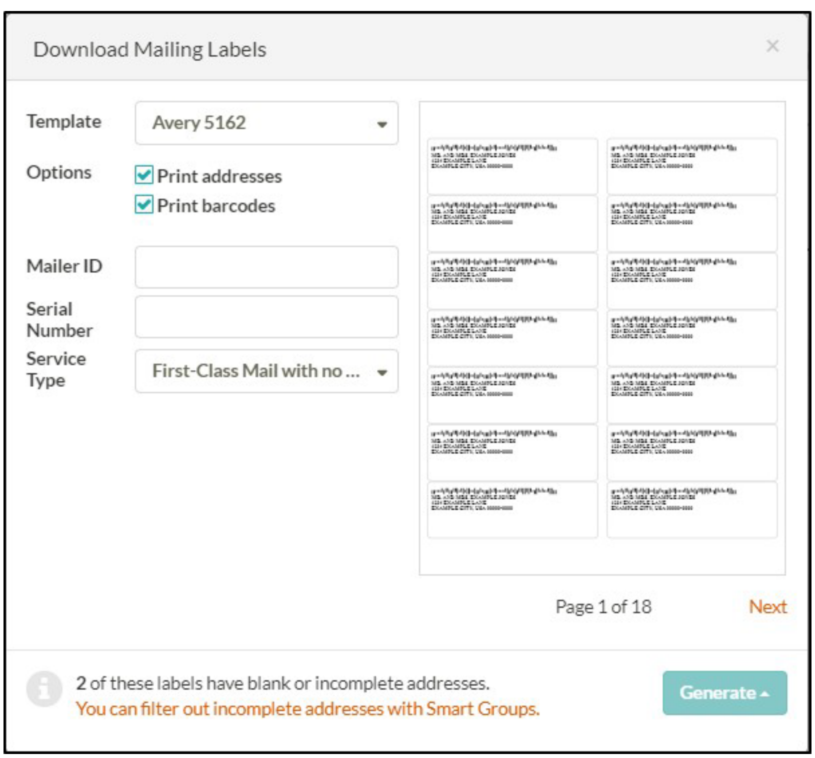


Exporting Mailing Labels for Households

If you would like to create mailing labels for each household in your congregation, export mailing labels from the Households mode.

Across all modes, mailing labels can be exported for specific Smart Groups.

1. Select the Smart Group whose Mailing Labels you wish to export to PDF or Word.
2. Click "Download" at the top of the screen and select "Mailing Labels."
3. Choose the mailing label template by selecting the desired option from the drop-down menu.
4. Select whether or not you desire to print addresses.
5. Select whether or not you desire to print barcodes. If you choose to print barcodes, you will be prompted to enter a MailerID, Serial Number, and Service Type.
6. Click the "Generate" button. You will be prompted to select the file format (PDF or Microsoft Word). After selecting the file format, the box will change color to let you know it is working.
7. When the labels are ready, the "Download" button will turn green.
8. Click on the green "Download" button, and your file will automatically begin to download.
9. Once the file is downloaded, click on the file name to open it.



Using Barcodes on Mailing Labels

If you are sending a bulk mailing, you may wish to add a barcode on each of your mailing labels.

Follow these instructions to download and utilize these barcodes in Church360°Members.

1. In the People view, click "Download" at the top of the screen and select "Mailing Labels."
2. Next to the "Generate" button, you will see a message prompting you to install the USPS Intelligent Mail barcode. Click on the hyperlink and the file will automatically begin downloading in your browser.
3. Once the file is downloaded, click the file to open it and begin installing fonts.
4. Within the file, click on the "Install" button and follow the instructions as prompted.
5. Once the font has been downloaded and installed, you may continue with your process of downloading mailing labels. You will only need to install the font on your computer one time and it will apply to subsequent mailing labels exports.

Note: If you are not a system administrator, you may need special permission to download this font.

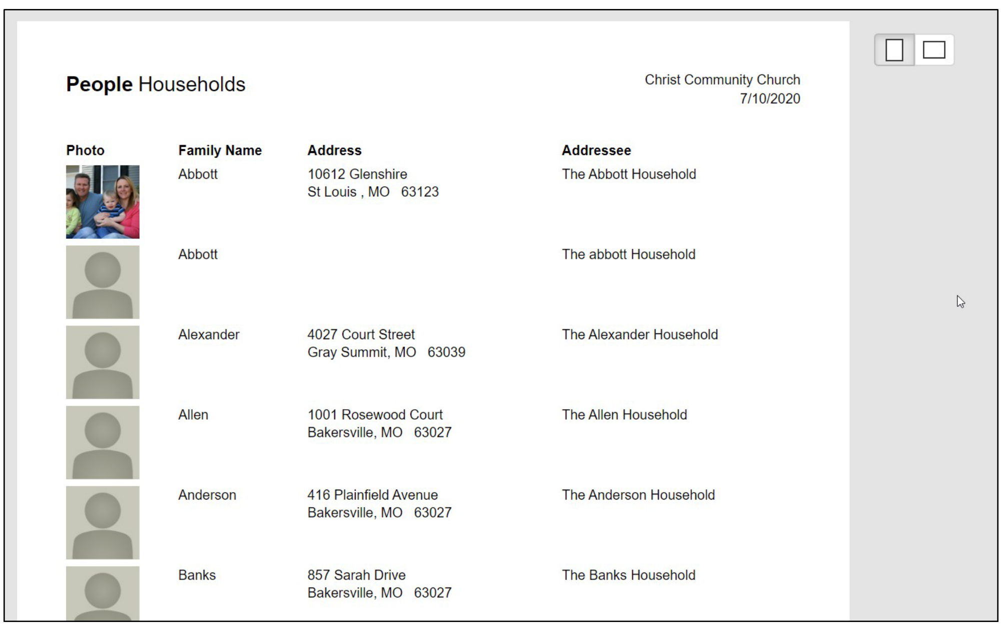
Printing from the People View

You can print a list of individuals or households in the People view.

Whenever you need a hard copy of the people in your Church360º Members site, you can print off a list of the specified individuals or households.

1. Select the Smart Group you wish to print.
2. Select the columns you wish to print.
3. Click "Print" in the top right corner of the page. A print-friendly list will open in a new window in your Internet browser.
4. From here, you can print your list by clicking CTRL+P or "File" and "Print" in your browser.

Note: In the top-right corner of the print window,there is a button to switch between portrait and landscape printing

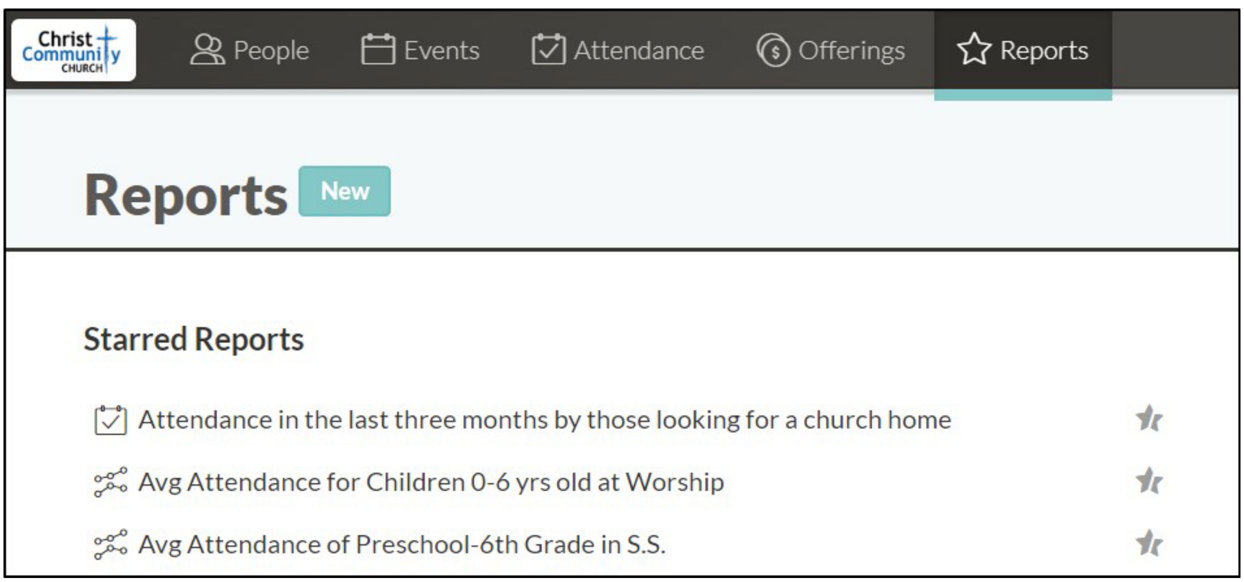


Saving Reports

Saving reports is a convenient way to create shortcuts for filtering results that you use often. If you find yourself frequently filtering your People view by a specific Smart Group, adding a report for this filter will give you quick access to this list in the Reports view.

1. Select the Smart Group you wish to save for your report.
2. Select the columns you wish to save for your report.
3. Click "Save Report" in the top right corner of the page. A notification will appear in the top right corner of your screen, alerting you that your report has been saved to the Reports page.
4. To access your report, click on "Reports" in the Primary Navigation on the top of the page. Your created report will be located in Starred Reports section.

Note: Un-starring a report that you created will delete the report. If you delete a report by mistake, you will have to manually recreate the report again.



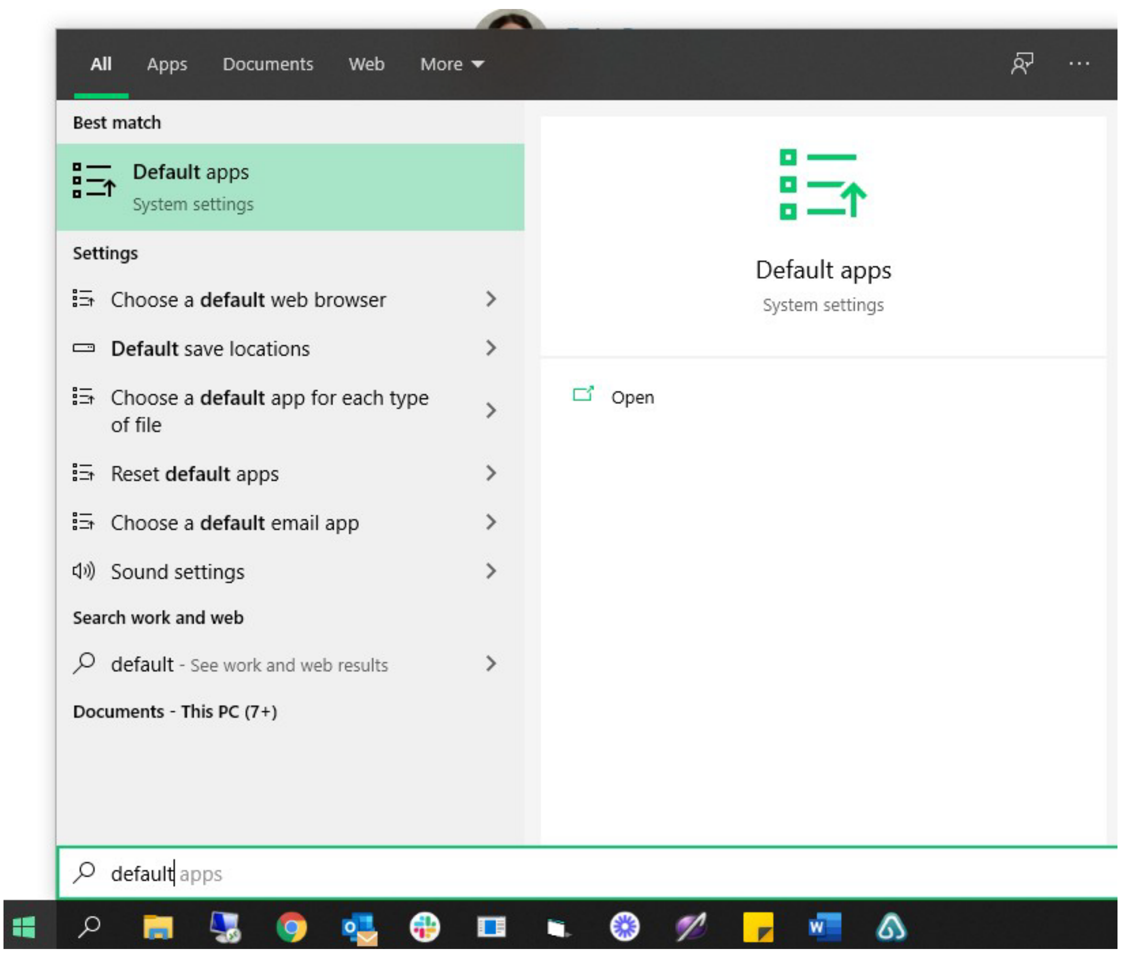
Sending Emails

Communicating with your congregation is vital. Church360°Members has an easy-to-use email function that allows you to send emails to one or all of your people.

To send from your chosen email address, you must first designate the default email client.

To see who your current default client is,

- Go down to the Windows logo at the bottom left of the screen. When the Start menu appears, start typing "Default apps".
- Once that match appears, click on it to see your default set-up. Email should be the first app shown.



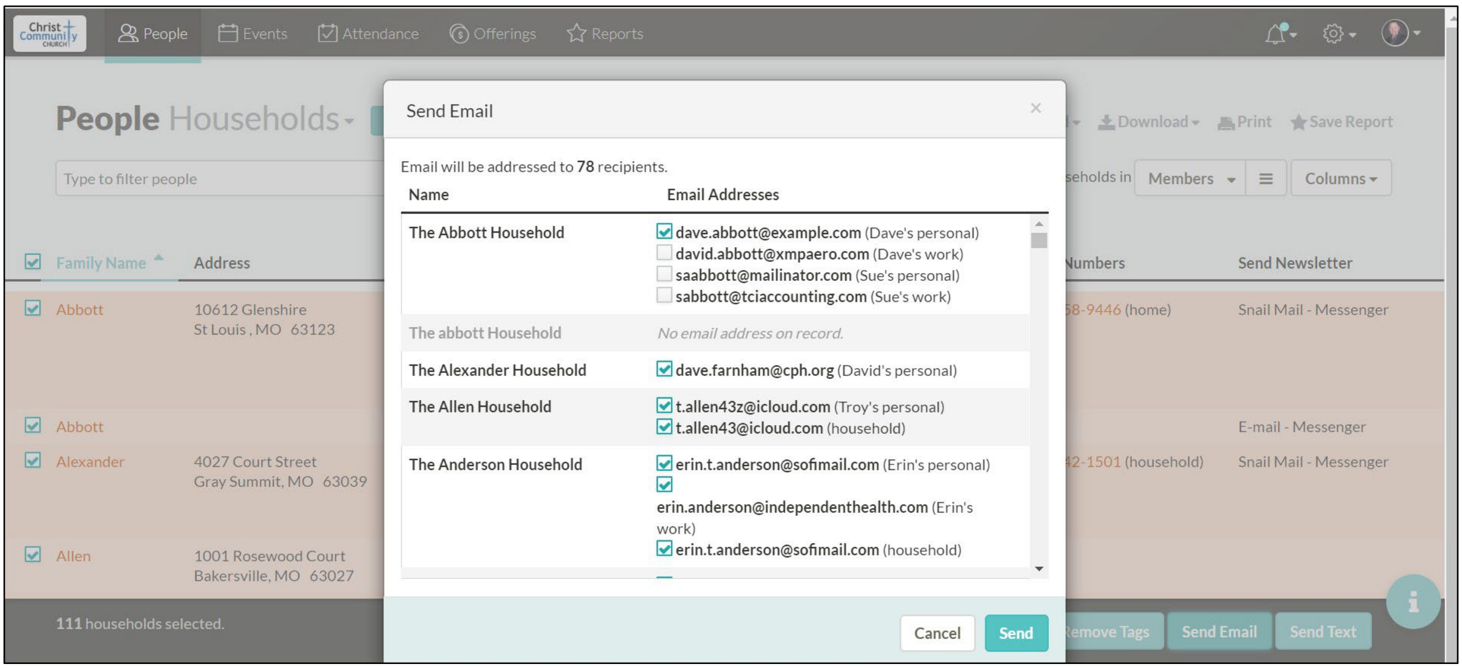
What you want as your email client depends on how you use your email.

It's recommended to use your email address through the Outlook desktop app on your computer.

However, using an online email can work as well. To use these email clients, you would need to set your internet browser as the default email app, like Firefox or Chrome.

Regardless of the app, it is recommended to have your email inbox open while sending Church360° emails.

1. Filter to your desired Smart Group; then select the individuals or households you wish to email by checking the boxes to the left of their name(s). To send an email to everyone on the list, check the box next to "Name."
2. Click the "Send Email" button on the ribbon at the bottom of the screen. You will be taken to a screen listing the names and email addresses of the people you have selected.
3. Deselect any of the addresses you do not wish to email. Any undeliverable emails will be indicated by an alert signal and automatically deselected.
4. Click "Send." Church360° Members will create a new email message in your default email client (Outlook, Gmail, etc.).
5. After typing your email message, click "Send."



Sending Texts

Once you've set up your Texting in Church360 Members, and matched up any people in your congregation whose phone number didn't match with what you already had in Church360 Members, you're ready to send out a text message. To send text messages, follow the steps below:

1. Open the Person View
2. Check the box next to each person you'd like to send a text message to. You can select everyone in a group by clicking the check box in the column header row at the top of the person records.
3. Click "Send Text" in the gray bar at the bottom of the screen

4. This will bring up the texting window. In the bar on the left, you'll see each person you selected, and each of their phone numbers. You will only be able to check the box next to each phone number they opted in under.
5. Choose your message type. These are descriptions of what the texts may be for, and will provide you with a sample text you could use.
6. In the Enter Text Message field, type in the message you want to send. There is a 160 Character limit on text messages
7. Click Send. This will send your text message to each person you checked off in the texting window.

Note: The people view offers a "Opted In to Text Messages" group, which is selectable within the group selector. This group includes only those who have completed the opt-in process, including responding to the text message that goes out after entering their information into the opt-in email page.

Note: If a person's phone number appears as not being opted in, but you see their information on the "Match Phone Number Submissions" screen, this means that they have replied to the email to opt-in, but, they have not responded to the text message that this generates. Once they have replied "Yes" to that text message, they will be opted-in for text messages at your church.

Texting

X

Text will be sent to 2 recipients.

Nlame	Cell Numbers
Troy lBeilltori	☑ [redacted]
Jordan Bogart	☑ [redacted]
Rod Kyles	not opted in)

Message Type:

Choose a samp e template -.-

Enter Text Message:

Characters remaining: 160

Cancel 11:1

Glossary of terms used in Church360

Anniversaries

The dates of birthdays, baptisms, confirmations, deaths, and wedding anniversaries can be displayed in the Events view. Anniversary dates for any of these events can be added in an individual's profile.

Asterisk (*)

The symbol used to indicate a non-member in the church directory.

Attendance View

The view that allows you to record attendance for events that are in your Events calendar.

Barcodes

Generated bars for mailing labels, used to send mail through the USPS.

Calendars

A collection of different events in the church.

Column Selector

The tool that allows you to add or subtract sortable data in the Households and People views.

Contribution Statements

Automatically generated documents based on offerings. These provide accurate, yearly information on your members' giving history.

Criteria

A collection of traits that are used to define a Smart Group.

CSV

An exportable file type that stores your members’ data for use in a spreadsheet program like Microsoft Excel.

Custom Fields

Uniquely created fields that can be used to record information that is specific to your church.

Docx

A exportable file type that can be opened in word processing programs like Microsoft Word.

Events View

The view that displays calendars for the various events scheduled in your church.

Filter

An option used to narrow down or refine a certain subset of information.

Headings

The bold text at the top of a page or section.

Household

A group of people who reside together.

Latin Cross

The symbol used in your data fields to indicate a deceased church member.

Listed

This designation can refer to either (1) people who wish to be listed in the church directory or (2) people who wish to have their phone numbers or email addresses listed in the directory (this second case can be used as a Smart Group trait).

Membership

The group of people who are listed as official members of your church. Visitors or guests are not counted as part of your church membership.

Offerings View

The view that displays financial contributions to your church from individuals or households.

Pastoral Visits

The view that allows you to see when members of your congregation have been visited by a pastor, staff member, or layperson. Use Pastoral Visits to make sure that people are visited periodically or when needed.

People View

The view that allows you to see individuals and households in your database.

Reports View

A collection of views that you use, email, or print frequently. Creating reports saves you from defining your view every time you need to email a group of people or view attendance for a specific date range.

Roles

The mechanism used to allow or deny access to certain features within Church360º Members. Roles prevent certain users from seeing private information or making unnecessary changes to your church information.

Shepherd's Staff

CTS's Windows-based, offline church management software.

Smart Group

A dynamic group of people that fit a certain set of criteria.

Tags

A way to label your members, allowing you to easily find people who meet certain criteria.

Traits

Qualities that describe a certain person.

Trends

A collection of data that compares statistics across time periods.

Profiles

This section provides information on individual and household profiles. Profiles store membership, Baptism, confirmation, birthday, anniversary, and contact information for families and individuals.

- Viewing Offerings Records for an Individual
- Changing Offering Envelope Numbers
- Emailing an Individual Contribution Statement
- Printing an Individual Contribution Statement

Overview of Profiles

Both individual and household profiles are found within the People view.

Individual profiles display all known information about a person. Contact information, personal information, family members, giving and attendance information, and tags can be accessed from this page.

Household profiles keeps track of family information, such as contact information and family members. The individual members' contact information does not transfer to this page. Information specific to the household must be entered into the household profile page.

Individual Profile Overview

The profile view displays basic information about an individual.

Name

Shows the name of the member. Used to update the person's name. **Note:** The Legal Name will be the name that is used on the Contribution Statements.

Type of Member

Displays what the individual's status is (baptism, confirmation, etc.). This is affected by the History section

Download

Contains options to export or download information.

Export

This feature will export information about the person to a CSV or Excel file and vCard. For further instruction, please refer to our article on how to export People or Household view to CSV or Excel.

Download

This feature allows you to download reports for an individual. For more information on downloading data, please refer to our articles on how to download Contribution Statements and how to download mailing labels.

Print

This feature prints the profile of the currently selected individual.

Contact Information

The main screen on the profile displays basic information about the individual.

- **Mailing Address**—displays data from the household record. To change the mailing address, click on the displayed address.

- **Phone numbers**—shows any household number(s) listed in the household profile as well as any personal phone numbers (work, cell, or home). To add a phone number, click on "Add a phone number" and enter the new phone number. To delete a phone number, hover over the desired number and click the minus sign to the right of the number.

- **Email Addresses**—will display the individuals email address(es). To add an email address, click on "Add an email address" and enter the new email. To delete an email address, hover over the desired address and click the minus sign to the right of the email.

Family

This heading displays current linked family members and their relationship to the family unit. Click the "+" icon to add additional family members /relationships to the individual's profile.

Profile Photo

The individual's profile photo will appear in the top right corner of the screen. To edit or add a photo, click on the photo box, select "Choose file," and click "Accept" to save the changes. To remove a photo, simply click "Remove Photo."

Additional Information

Additional information about the individual is displayed on the right side of the screen underneath the profile photo. To edit any of this information, click on the desired trait to open the edit box. Any custom fields that you have created would be displayed as well.

- **Sex**—lists the gender of the individual.
- **Ethnic group**—lists the individual's race.
- **Birthday**—displays the individual's birth date. The age will be displayed next to the birth date.
- **Baptism**—if baptized, and the baptism date is displayed. **Confirmation**—
- if confirmed, the confirmation date is displayed. **Deceased**—if deceased,
- the death date is displayed.
- **Grade**—if applicable, lists the current school grade.

The following additional information links to other pages that will display their records:

- **Envelope number**—displays the current envelope number and contains a link to the envelopes view
- **Last attended**—displays the last date a person attended any event and contains a link to the Attendance Detail report for the individual.
- **Last visited—**displays the last pastoral visit date and contains a link to the visits that have been added for the individual
- **Offerings—**contains a link to the offerings view that will show the offerings that the individual has given.
- **Pledges--**contains a link to the pledge view that shows any pledges that the individual has.

Tags

If the individual has any tags assigned to them, they are listed on the main profile screen below email addresses. To add a tag, click "Add a tag" and type in the desired tag.

History

Displays any notes related to the person. This includes Notes, Pastoral Visits and Status history (Member & Nonmember Actions).

Archive

To delete an individual, click "Archive this person."

Household Profile Overview

The profile view for a household will display basic information about the household as a whole. From here, you can see a variety of information about your selected household and perform numerous functions:

Family Name/ Addressee

Displays the Family Name and Addressee (Mailing Label Tag)

Mailing address

Displays the household address as well as the Away address (My mailing address is different) if they family is away (snowbirds)

Phone number(s)

Displays the phone number(s) associated with the household

Email Address(es)

Displays the household email address.

History

Shows any Notes/Pastoral Visits that have been added to their household record. Any notes added to the household will also appear as a note on each person within the household.

Members

Shows the current family members.

Download

Used to export information about the household.

- *Export to CSV or Excel*—exports the household record to a CSV or Excel file. For more information on exporting information to a CSV or Excel file, refer to our help article on how to export People or Household view to CSV or Excel.

- *Mailing Labels*—allows you to download a mailing label for the household. For further help on downloading mailing labels, read our article on how to download mailing labels.

Print

Used to print a household record.

Household Photo

Displays the household photo.

Additional Information

Displays information related to the household.

- *Custom Fields*—indicates whether or not the household is signed up to receive newsletters. Send Newsletter is an example of a custom field.

- *Last visited*—displays the last pastoral visit date (includes a link to pastoral visit record).

Delete a household

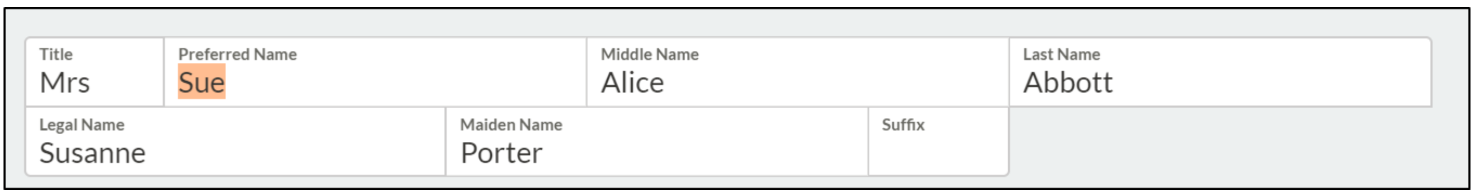
Deletes the household record from the system.

Updating Names in Profiles

In both individual and household profiles, you can make changes to people's names.

Changing a name is useful to fix a typo or change a last name after a person is married.

1. From within the People view, select the appropriate "Individuals" or "Households"option.
2. Click on the individual or household name to open the profile.
3. Click on the name at the top of the page. Enter the changes to the name.
4. To exit the edit window and save your changes, click anywhere outside of the name edit box.

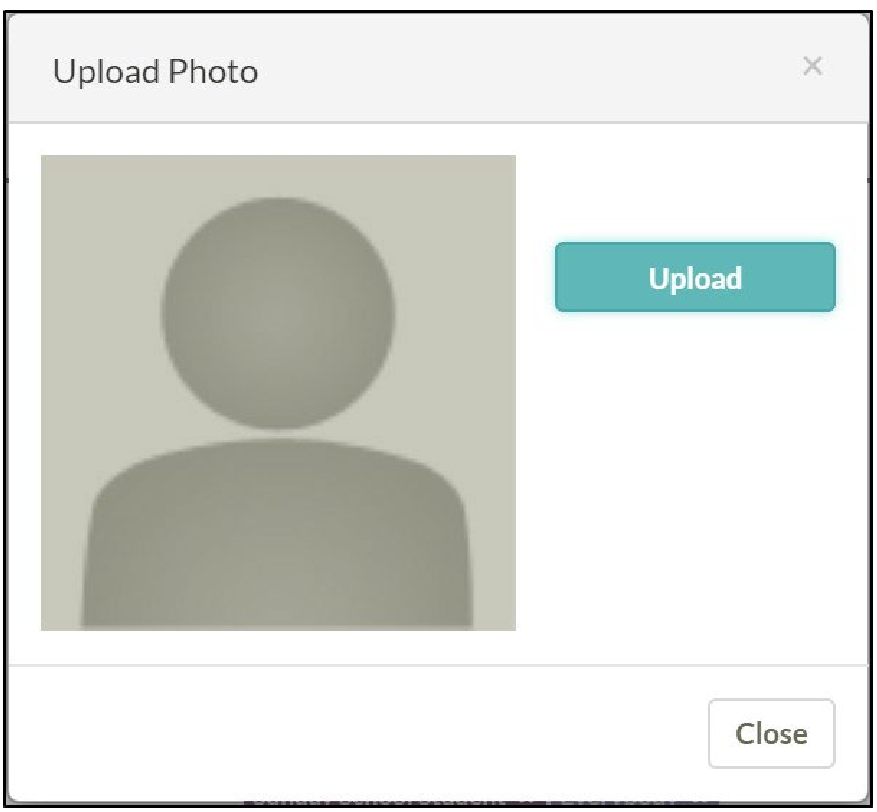


Adding Images to Profiles

In Church360° Members, individual and household profiles can have profile pictures.

Profile pictures allow you to easily recognize and identify individuals and households In the People view.

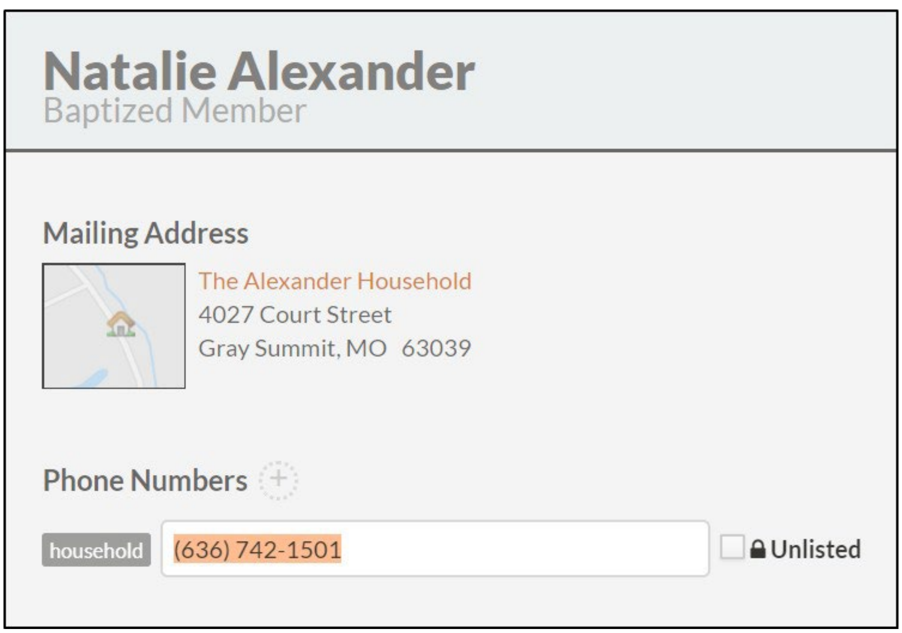
1. Click on the person's name whose profile picture you wish to add.
2. Click on the gray profile icon in the top right corner of the page.
3. Click "Choose File" to upload the image.
4. To crop the image, simply click on the individual's image.
5. Click the "Crop" button.
6. Adjust the cropping box.
7. When finished click "Crop."
8. Click "Close." Church360° Members will automatically save the picture to the profile.



Updating Contact Information

In a profile, you can make changes to contact information, such as addresses, phone numbers, and email addresses.Updating this information makes sure that newsletters are being sent to the correct address and that staff members are calling the correct phone number.

1. From within the People view, select the appropriate "Individuals" or "Households" option.
2. Click on the individual or household name to open the profile.
3. To add new information, click the Plus sign next to the Phone Number or Email Addresses headers to create new information. Click anywhere outside the edit box to save your changes.
4. To edit existing information, click on the criteria you wish to update. To save your edits, click anywhere outside of the edit box.
5. If the person does not wish for his or her email address, mailing address, or phone number to be listed in the church directory, select the Unlisted check box. Then, click anywhere outside the edit box to save your changes.

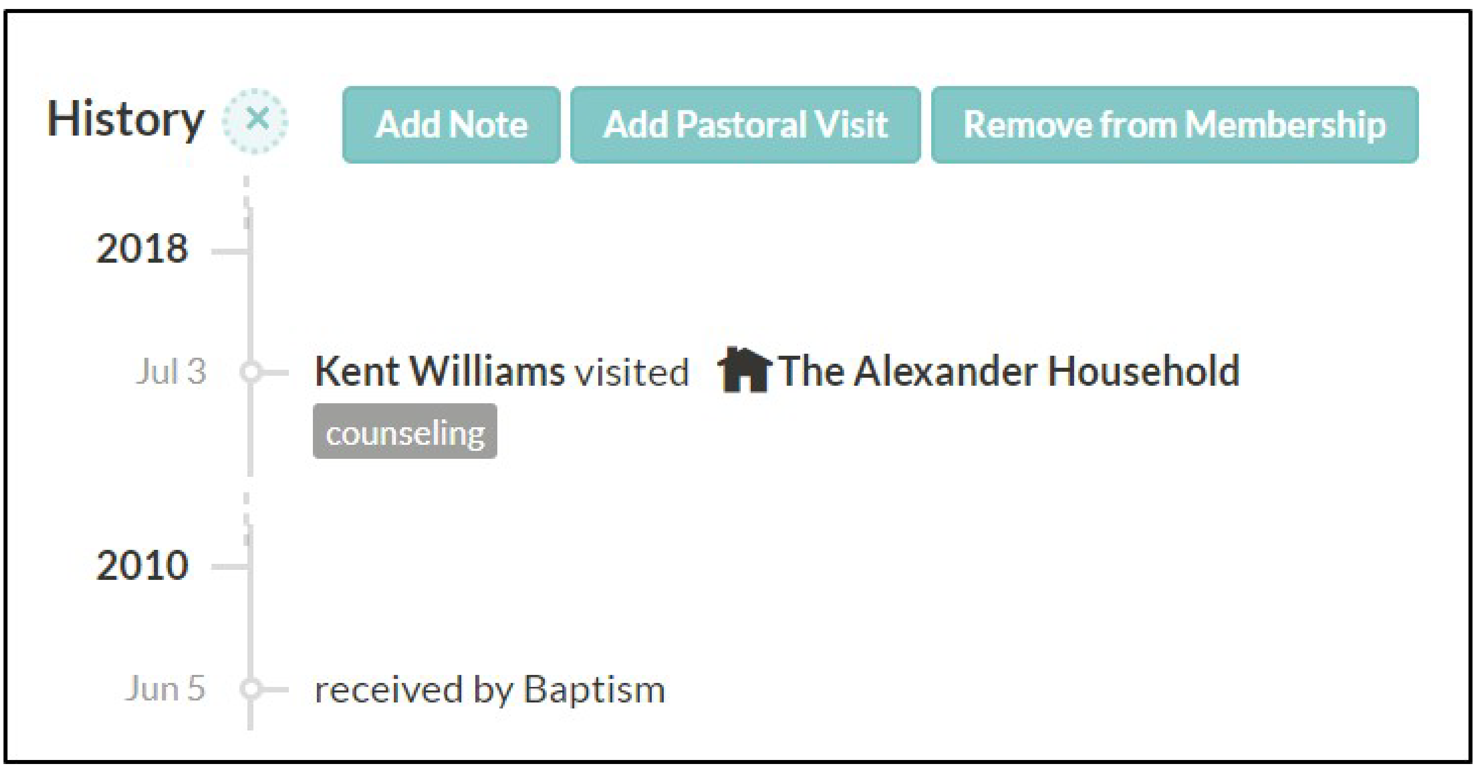


Adding, Editing, and Deleting Notes in Profiles

You can add notes to profiles in Church360° Members.

This utility is simple and open; it gives you the flexibility to make notes for the households in your church according to your needs.

1. From within the People view, click on an individual or household name to open the profile.
2. Click on the plus sign in the History section; then select "Add Note."
3. Enter in your note information.
4. Update the "This can be seen by" section.
5. Click outside the note box to return to the normal profile view; your changes will be saved automatically.
6. If you later wish to edit the note, you may click inside the note to edits its contents. and click anywhere outside the edit box to save your changes.
7. To delete the note, hover over the note name, click on the minus sign, then click on the red "Delete" button to confirm your deletion.



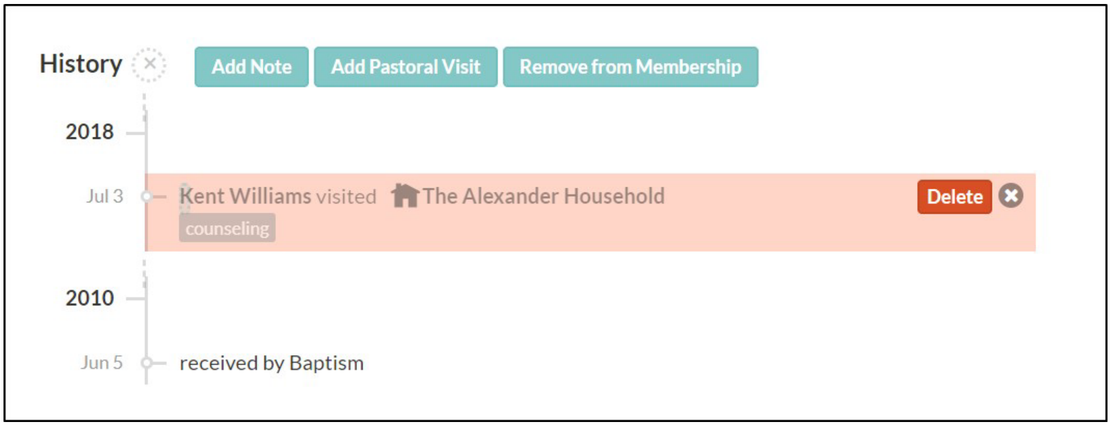
Adding, Editing and Deleting Pastoral Visits in Profiles

In Profiles, you can view Pastoral Visits made to each person.

This tool tracks when members have been visited so you can make sure that people are visited periodically or when needed.

Pastoral Visits can also be tracked in the Pastoral Visits section of settings.

1. From within the People view, click on an individual or household name to open the profile.
2. Scroll down to the History section of the profile to view a history of notes and Pastoral Visits made to this person.
3. Click on the plus icon in the History section; then select "Add Pastoral Visit."
4. Enter the appropriate information into the"visited by" section. You may add multiple visitors.
5. Enter the appropriate visit-type information into the "tagged" section. You may add multiple Tags to the visit.
6. Add an associated note, if desired.
7. Click outside the note box to return to the normal profile view; your changes will be saved automatically.
8. If you later wish to revise the Pastoral Visits information, you may click inside the note to edits its contents. Click anywhere outside the edit box to save your changes.
9. To delete, hover over the Pastoral Visits name, click on the minus sign, then click on the red "Delete" button to confirm your deletion.



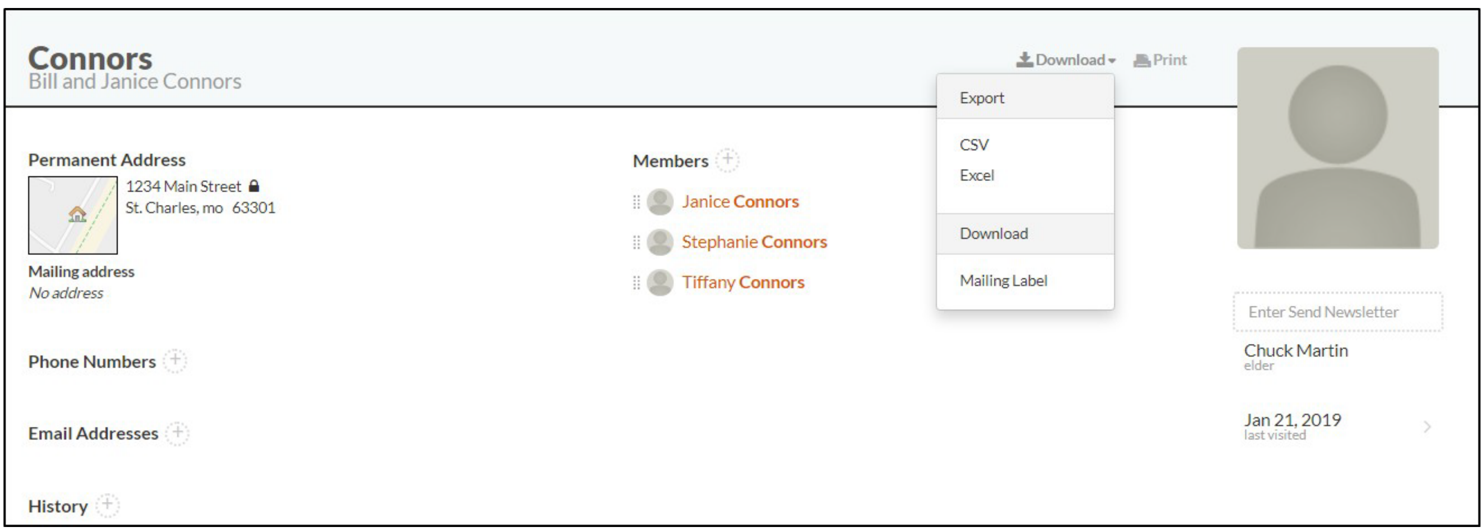
Church360° Members › People › Profiles

Printing and Exporting Individual and Household Profiles

If someone is transferring to another church, it could be helpful to print out their individual and household records to take with them to their new church.

To print a record,

1. Click on the individual’s name to open the profile you need.
2. On the far right of the screen, click Download to export the record into a CSV or Excel file.
3. Click on the “Print” button. The record will open in a new browser tab. The notes printed or blacked out are dependent on the printing user's Role.
4. To save, click CTRL+S or “File” and “Save.”
5. To print, click CTRL+P or “File” and “Print.”



Deleting Individual and Household Profiles

For a person to be deleted, they must first be archived, and once they have been archived you may delete those people from the archive view.

To access the list of archived persons,

1. Go to the People: Individuals page
2. To the right is a drop down menu of people you want to show.
3. Scroll all the way to the bottom of the menu to find the Archive. Anyone who is archived will have an archive box next to them. If you go into the archived person's profile, their information will still be there.
4. Where the button was previously to archive the profile, there should now be an option to unarchive them, which will bring them back into the main group, or delete them, which removes their data forever.

It is not recommended to delete a person if they have attendance or contribution records, for bookkeeping purposes. It is a utility mostly used for duplicate profiles.

For more information on the archive view, and a short demonstration of this feature, check out our blog on Archiving in Church360 Members.

There is not a button for deleting households in Church360 Members as households are automatically deleted when there are no more people in that household.

Adding and Editing Relationships from an Individual or Household Profile

In an individual or household profile, you can add new family members after a marriage or birth as well as create and manage the relationships between people in your church.

From a person profile,

1. Find the individual you wish to add family members to and click on the person's name to open the profile.
2. On the profile, click on the plus icon next to "Family."
3. Use the member drop-down menu to select the name of the individual. You can type in the name of the relative or scroll through the list.
4. Use the relationship drop-down menu to select the relationship to the individual whose profile you are viewing.
5. Once all information is correct, click the"Add" button.

From a household profile,

1. Find the household you wish to edit and click on the household name to open the profile.
2. Click on the plus icon next to "Members."
3. Use the member drop-down menu to select the name of the individual. You can type inthe name of the relative or scroll through the list.
4. Once the name is selected, click the "Add"button.

If a relationship is incorrect, you can delete the incorrect relationship in a person's record without affecting the relations' information.

To do this,

1. Hover over the relationship and clicking the minus sign to the right of it.
2. This will show some options on what to do with the relationship, including Delete. Click the Delete button.

Family

•Mf:.Qj.i.,

Walt **Moore**l 89

Married **Oct 26, 1963**

Contributes **Jointly**

Select a Person ...

Child• -

New Person: mab

Mable Moore

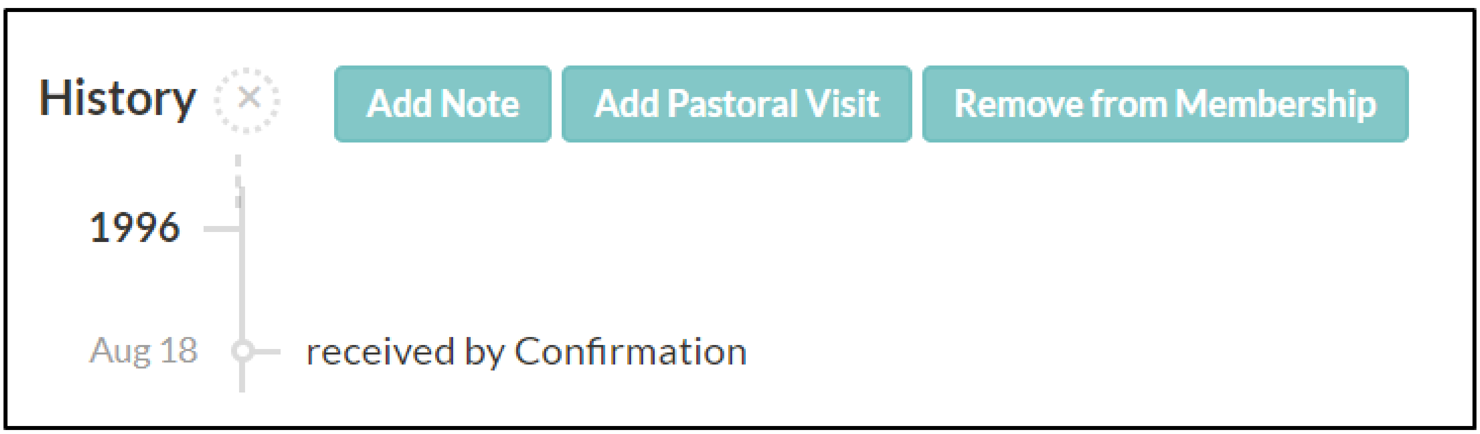
Add a tag

Updating an Individual's Membership Status

A person's profile allows you to keep track of his or her membership status within your church.

If there are any changes to a person's membership status — such as becoming a baptized or confirmed member — you can go to the person's profile and make the necessary changes.

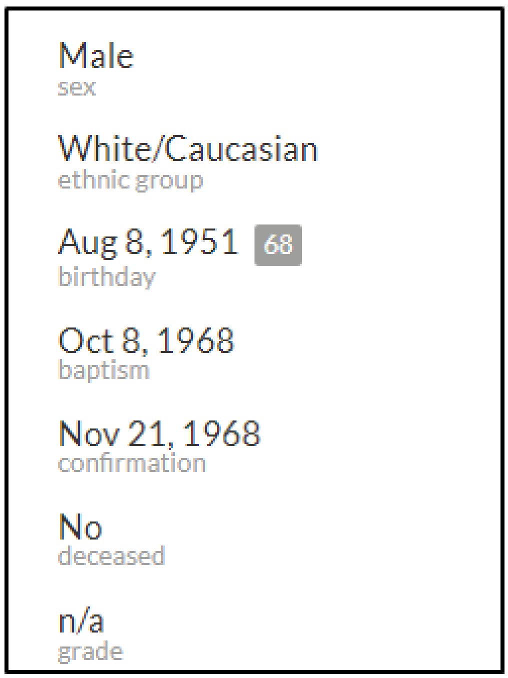
1. Click on the individual's name to open that person's profile.
2. Click on the plus icon in the History section and select the appropriate "Receive as Member" or "Remove from Membership Option."
3. A drop-down box will appear; select the reason for the membership removal or reception. Your changes will be saved automatically.



Updating Personal Information

In a person's profile, you can update, add to, and edit the personal information for that individual, such as sex, ethnicity, and birthday.

1. Click on the name of the individual to open that person's profile.
2. Personal information is located on the right side of the page underneath the profile photo. Click on any information to enable editing.
3. To save your changes, click anywhere outside the edit box.



Entering a Marriage

Showing wedding anniversaries on an events calendar and joint contributions in Church360º Members is dependent on a couple being marked as being married.

To enter a marriage,

1. Go to the People view by clicking "People" in the top navigation.
2. Find one of the two people in the marriage and select them to view the person profile.
3. Click the plus sign next to Family in their record. This will bring up a drop down box where you can select a person.
4. Select the person you'd like to add as their spouse, and then, in the drop down box next to it, select spouse as the relationship.
5. Click Add and the relationship will appear.
6. Click on Enter Date under the Spouse's name, and you can fill in the date these people were married as well as if the couple will be contributing jointly or separately.

Entering a Divorce

The result of a divorce affects how it should be handled in Church360°® Members. Most likely, you want to still have a record of the prior relationship without having the couple show up as a current marriage.

1. Go to the People view by clicking "People" in the top navigation.
2. Find one of the two people in the marriage and select them to view the person profile. Under the family section will be listed the spouse, children, and other relatives of the person.
3. Mouse over the spouse and click the now-visible delete symbol. Various options appear including "Divorced", "Deceased", and "Delete".
4. Select "Divorced". A new line will appear under the marriage date. Click "Enter Date" to enter the date of the divorce.

If the couple were previously giving jointly, adding a divorce status will separate their future offerings.

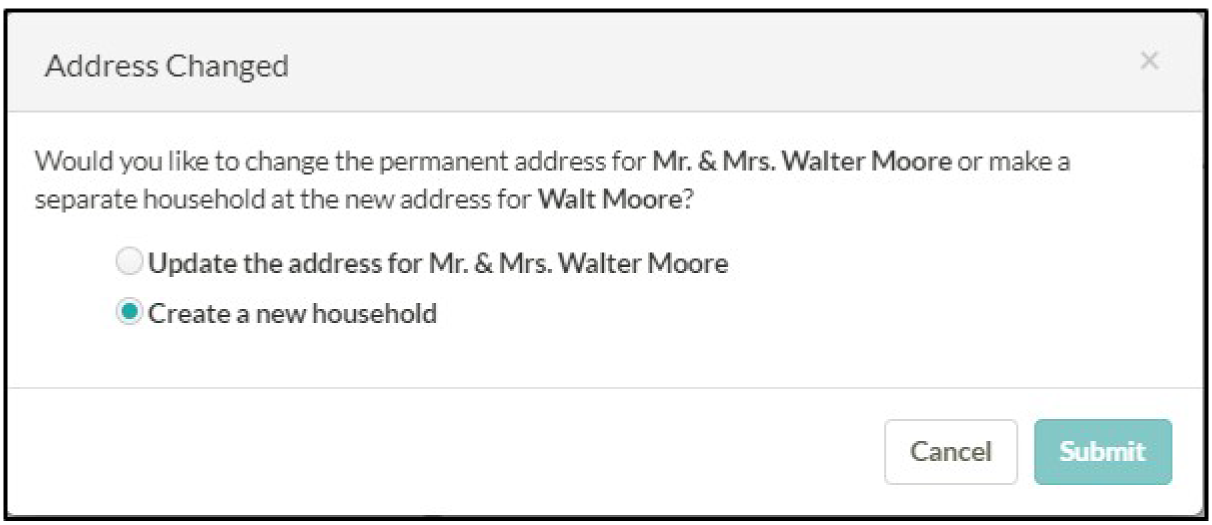
After adding a divorce, it is recommended to check each person's envelope number to make any necessary changes.

Changing an Individual's Household or Address

A person's household can be edited in his or her individual profile.

This feature is especially useful as children grow up and leave their parents' households or join other households through marriage.

1. In the People view, click on the individual's name to open that person's profile.
2. Hover over the mailing address and click anywhere in the blue box surrounding that information.
3. Select the desired household from the drop-down menu if the household must already have been created to select it.
4. If the individual is moving to a new household, click the New button and input the new address or leave it blank.
5. Click anywhere outside the blue box to save your changes.
6. If you are creating a new household, you may be prompted on if this is an updated address or if you are creating a new household. Choose Create a new household and click Submit.

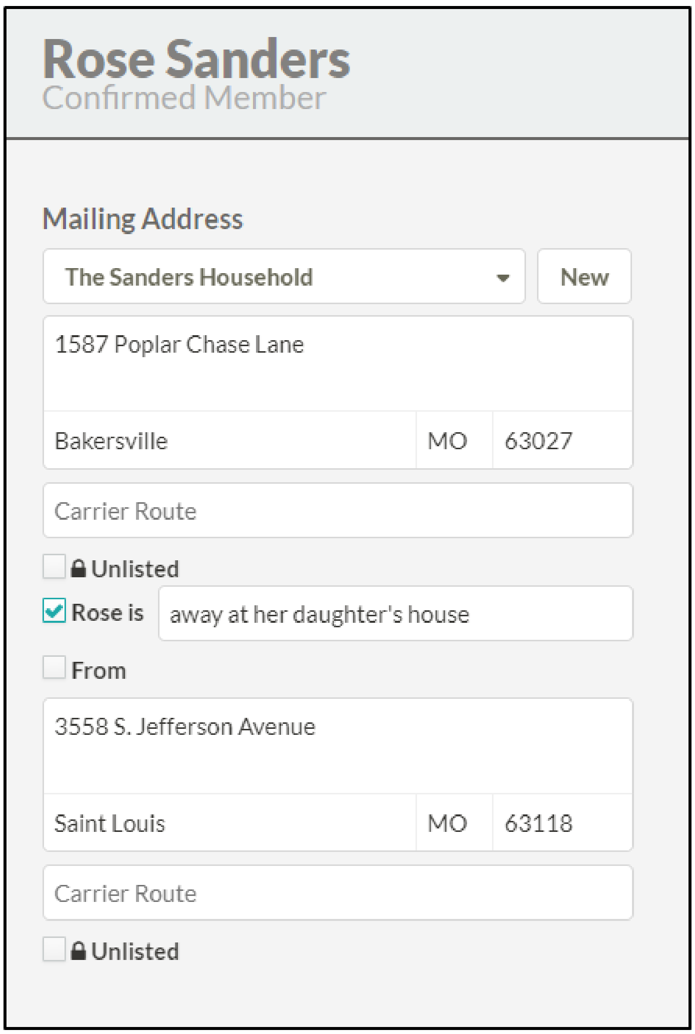


Adding Away Addresses

Away addresses can be used for people who reside in two different locations throughout the year.

Away addresses can be turned on and off manually or can be set to expire automatically.

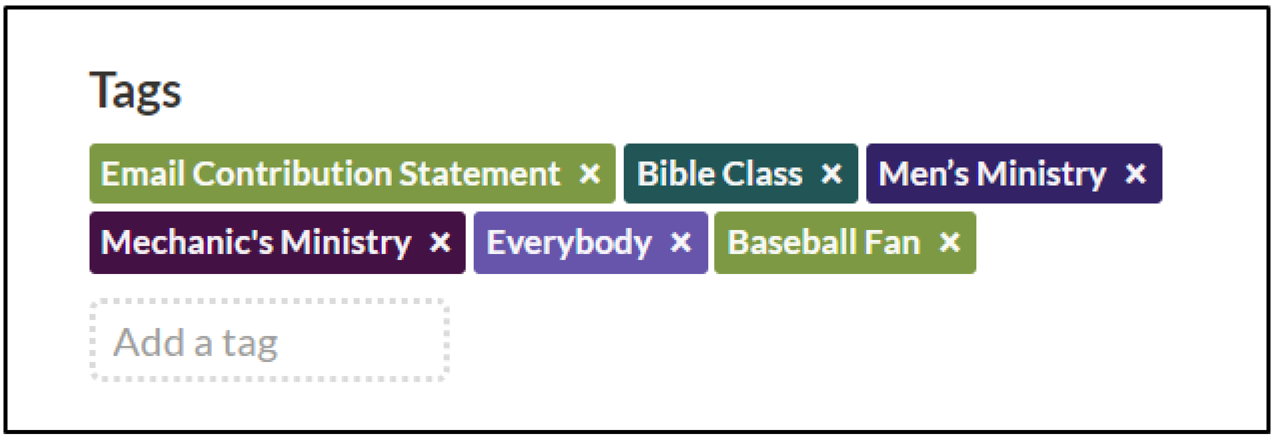
1. Select the profile of the individual whose away address you wish to edit.
2. Click on the address field and check the option that says the person is away.
3. Enter the street, city, state, and zip code information for the away address in the box below. If you wish, fill in the date range for the away address and complete any other information as necessary. A message will appear above the address in the person's profile to remind you of that person's away date.



Adding or Removing Tags from an Individual Profile

When you are editing only one person's information, adding Tags from that person's profile is more convenient than using the Mass Add/Remove Tags feature.

1. Click on the name of the individual to open that person's profile.
2. To add a new Tag, type the name of the Tag in the "Add a tag" text box.
3. To remove Tags, click the "x" on the Tag you wish to remove.



Send Newsletter Custom Field

Households have the ability to choose whether they want to receive a newsletter from your church.

For households that choose to receive your newsletter, you can print mailing labels for just those households.

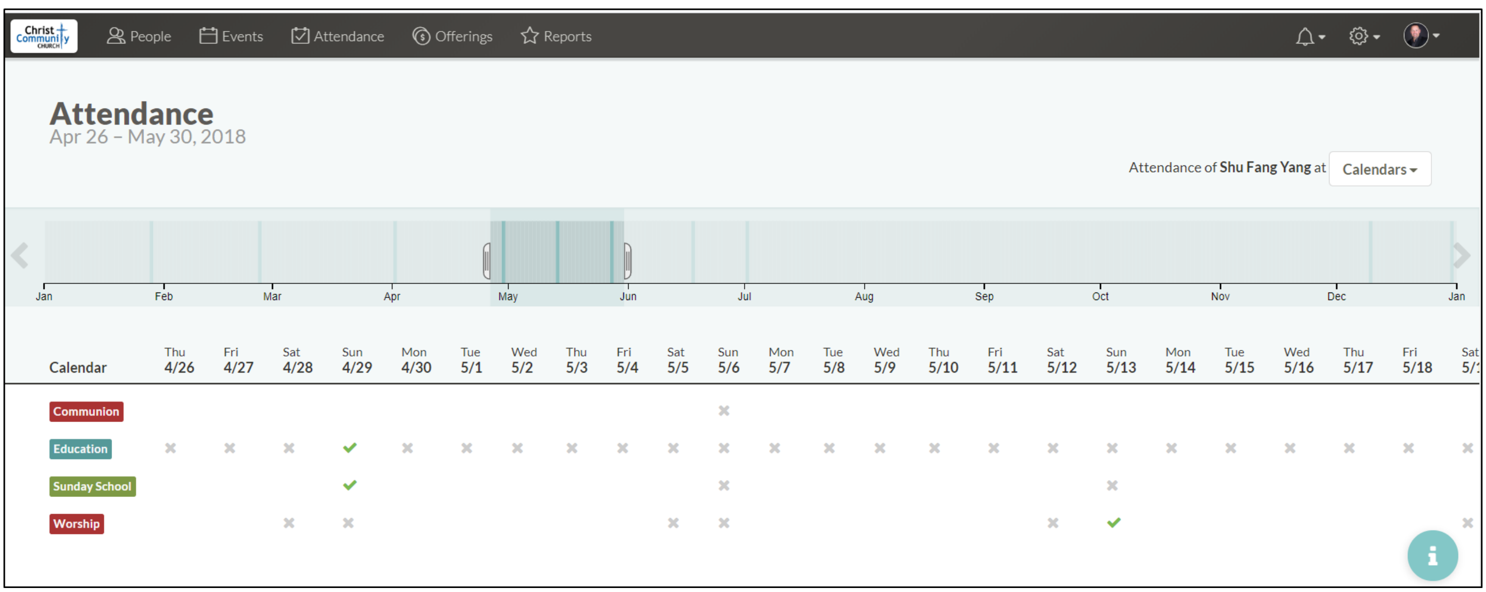
1. In the Households view, click on the name of the household to open the profile.
2. The household's newsletter preferences are listed as a custom field underneath their profile photo. Select the appropriate "Yes"or "No" option from the custom field to update their newsletter preferences.

Note: In order for you to update a Household's newsletter preferences, you must make sure that the Send Newsletter option is enabled for Household Custom Fields.

Viewing Attendance Records

A person's profile contains a link to view his or her attendance history.Here, you can view the events that this person has attended.

1. Click on the individual's name to open that person's profile.
2. Click on the "Last attended" link to open the personal attendance page. This page displays the latest events that this person has attended.
3. Use the date-range selector to specify the date range of the individual's attendance. You can do this by dragging the handles on either side of the selector to choose the start and end dates.
4. To filter your attendance results by calendar, use the drop-down menu on the top right portion of the page. Below the date-range selector is a summary of the events the person has attended, based on the date range you selected. The green check mark indicates the person attended an event, and the gray "x" indicates that the person did not attend the event.



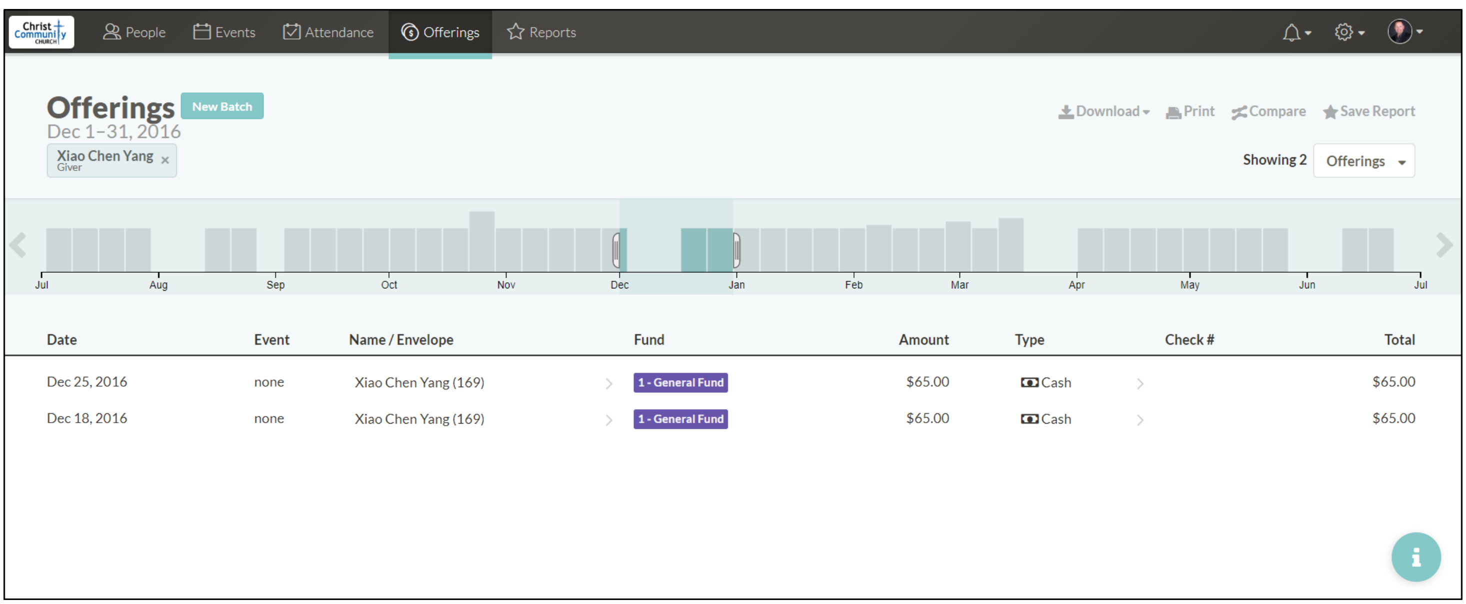
Viewing Offerings Records for an Individual

You can view Offerings records in individual profiles.

If a couple is giving jointly, the Offerings view that is displayed will be for the couple, not just the individual.

You can set up who has permission to view these records under Roles.

1. Click on the individual's name to open that person's profile.
2. Click on the "Offerings" link on the right side of the page to open the Offerings view. Here, you can view the individual's offerings that have been recorded.
3. Offerings data can be filtered by date, fund, or type of transaction (cash, check,electronic).
4. This information can be exported, printed, or saved as a report.



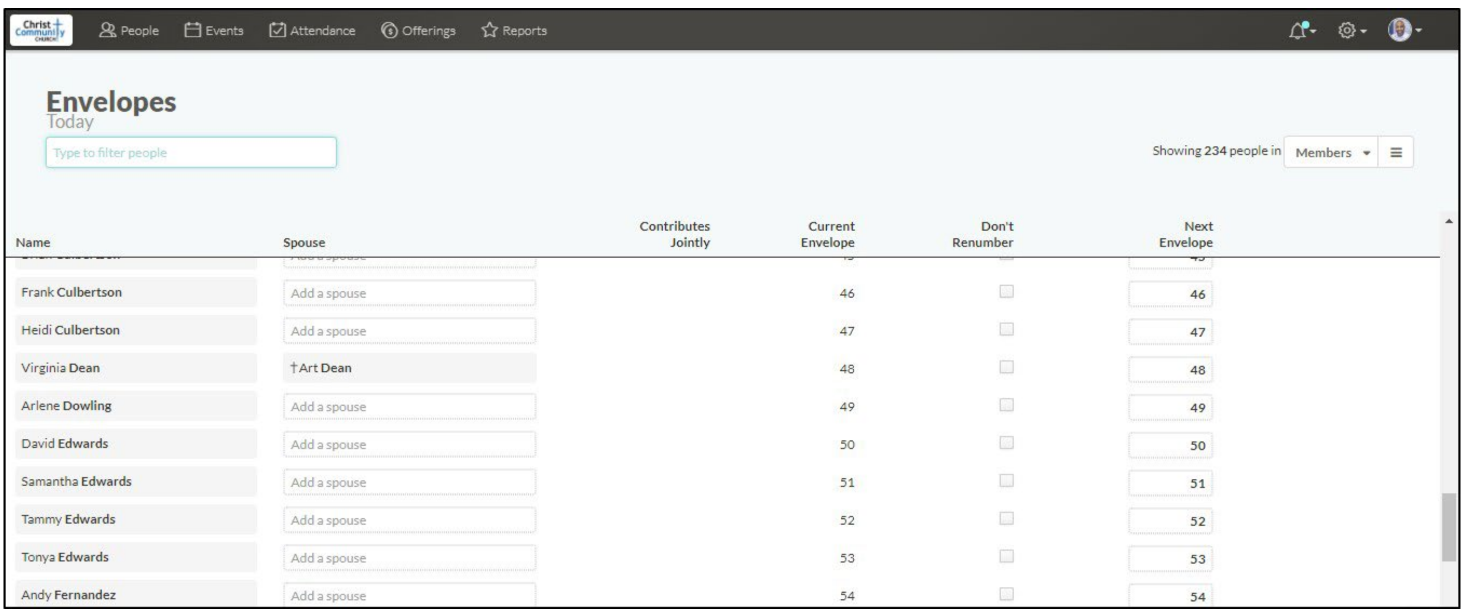
Changing Offering Envelope Numbers

An individual's envelope number can be changed from a link on his or her profile page.

This feature allows you to go directly to the person's envelope number on the Envelopes page.

1. Click on the individual's name to open that person's profile.
2. Click on the envelope number link on the right side of the page. The Envelope page will open.
3. To edit the individual's number, type in the new number in the "New Envelope" text box.

Note: Married couples can contribute jointly and give from the same envelope number. Changing the envelope number of an individual who contributes jointly will change the spouse's envelope number as well.

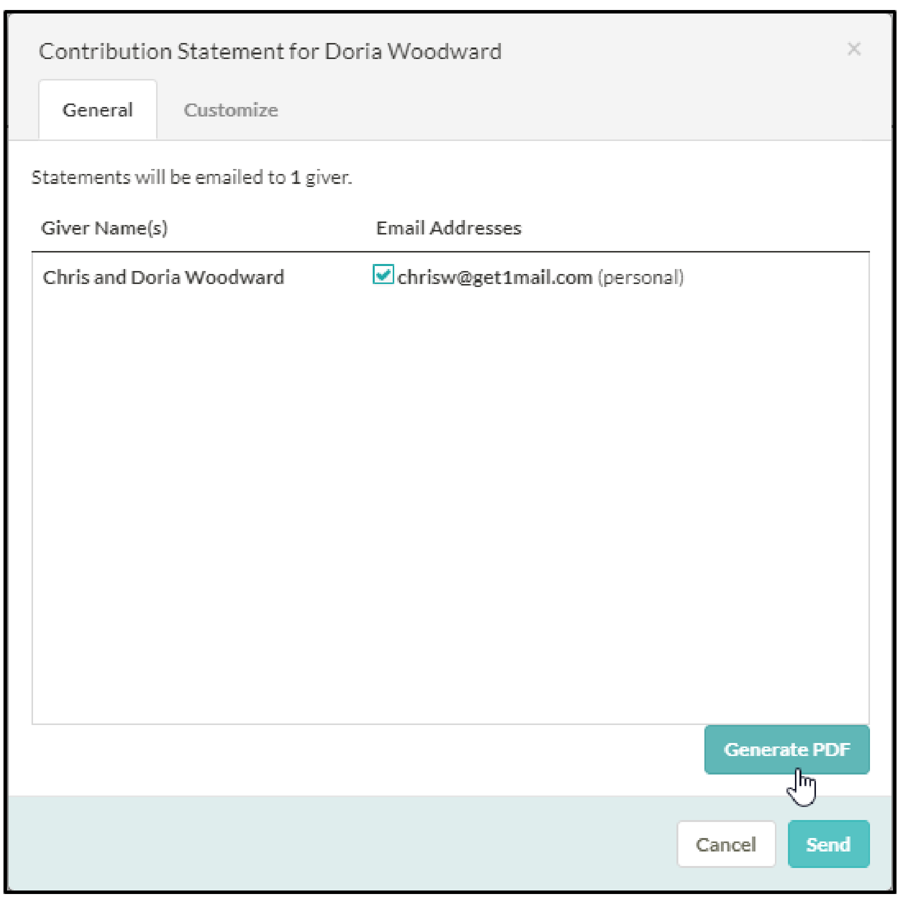


Emailing an Individual Contribution Statement

Individual contribution statements can be emailed from a person's profile in Church360º Members.

This feature is the best option to email a contribution statement for only one individual.

1. Click on the individual's name to open that person's profile.
2. Within the profile, click "Download" in the top right corner of the screen and select "Contribution Statement."
3. Select the date range for the statement.
4. If desired, input your church's federal ID number for tax purposes.
5. Edit the body of your email message in the box at the bottom of the screen.
6. Clicking on the "Review and Email" button to prepare your statements for email.
7. Click "Send." The email will be sent to your default email server, where you can make any changes before the contribution statement is sent.

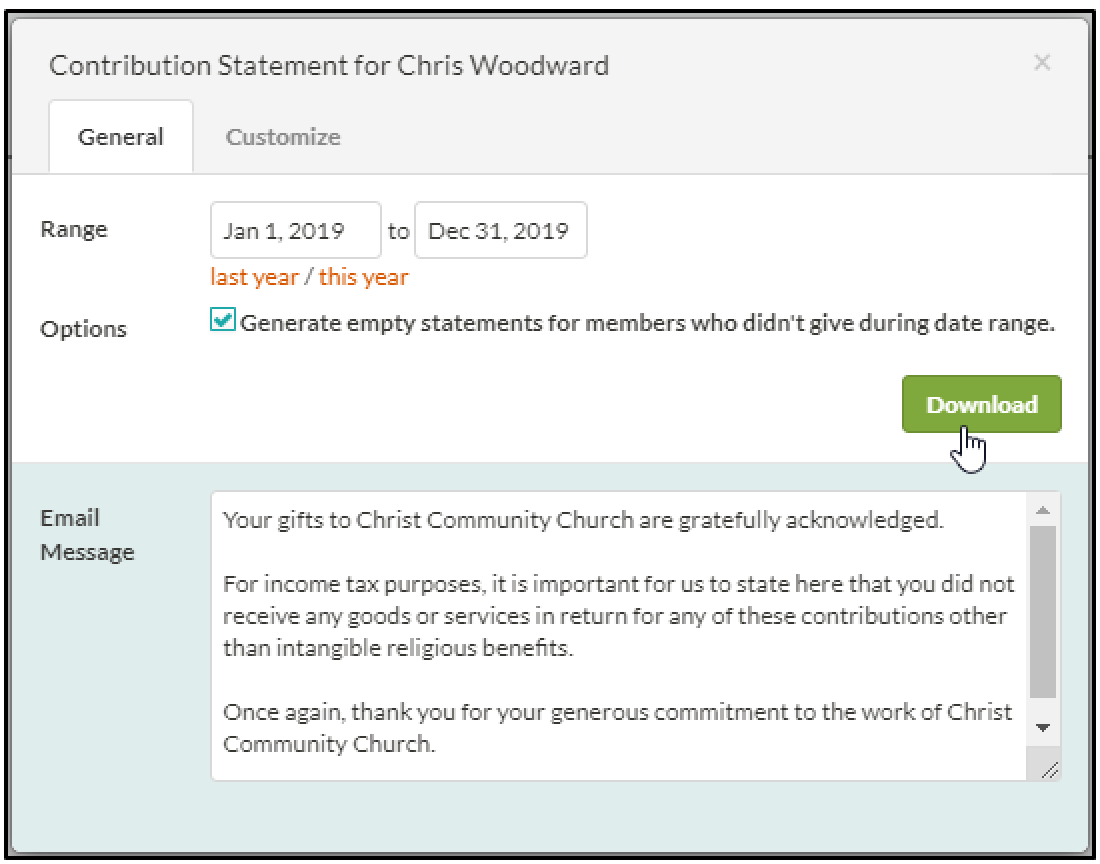


Printing an Individual Contribution Statement

Individual contribution statements can be printed from a person's profile in Church360º Members.

This feature is the best option to print a contribution statement for only one individual.

1. Click on the individual's name to open that person's profile.
2. Within the profile, click "Download" in the top right corner of the screen and select "Contribution Statement."
3. Select the date range for the statement you wish to download.
4. If desired, input your church's federal ID number for tax purposes.
5. Click the "Generate PDF" button. The button will let you know when it is working and turn green when the statement is ready to download.
6. Click the green "Download" button to Download your statement. A PDF of the contribution statement will open in a new tab in your Internet browser.
7. To print, click CTRL+P or "File" and "Print."



Events

These articles give an overview of the Event view. Here you will learn to create and edit events as well as which events appear on the calendar. Articles on Calendars are found in Collections.

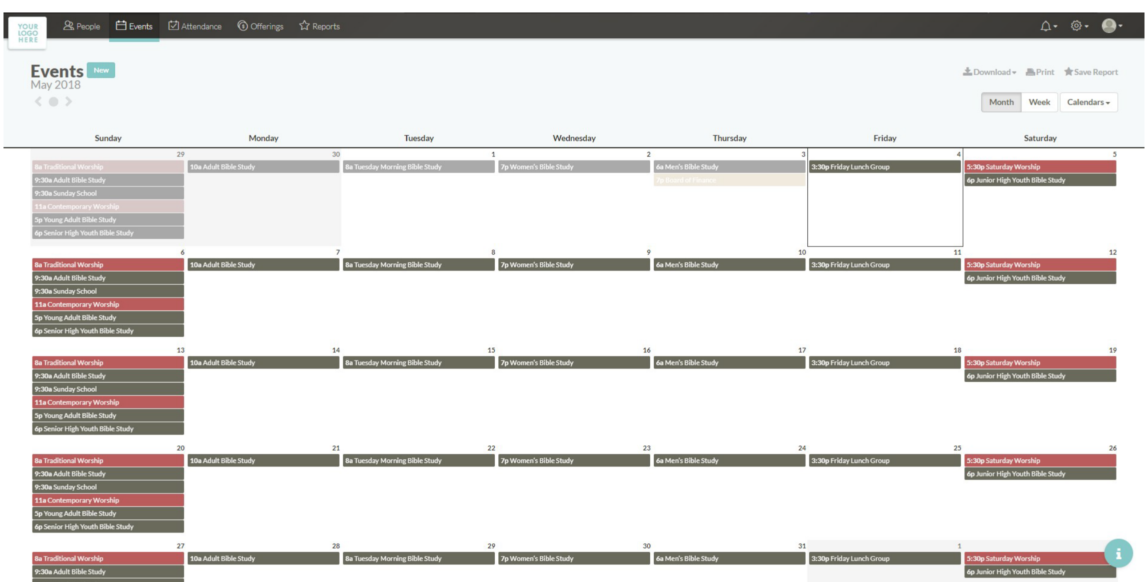
Events Overview

The events view in Church360°® Members is a basic calendar in which events can be created, managed, and organized similar to an Outlook calendar. Like in Outlook, events can be repeated, locations can be assigned, and notes can be added. However, in Church360° Members, events are also used to keep track of attendance, Communion, and offerings for record keeping, and a list of regular attendees can be added.

Note: Attendance cannot be entered unless an event has the "Attendance taken" checkbox marked. Similarly, offerings can only be linked to an event for which the "Offering taken" checkbox is marked. This is important for reports.

The main events view is a simple calendar that displays events that are selected in the "Calendars" drop-down in the upper right corner. Clicking the drop-down will display all the calendars that are active on your account. You can select and deselect calendars to find the ones you want to view. Next to the "Calendar" drop-down are toggle buttons to change the view to a monthly or weekly one. Above this are options to print, download, and save the view as a report. You can change the month or week you are viewing by using the arrows under "Events" in the top left corner; clicking the dot in between the arrows brings you back to the current month or week.

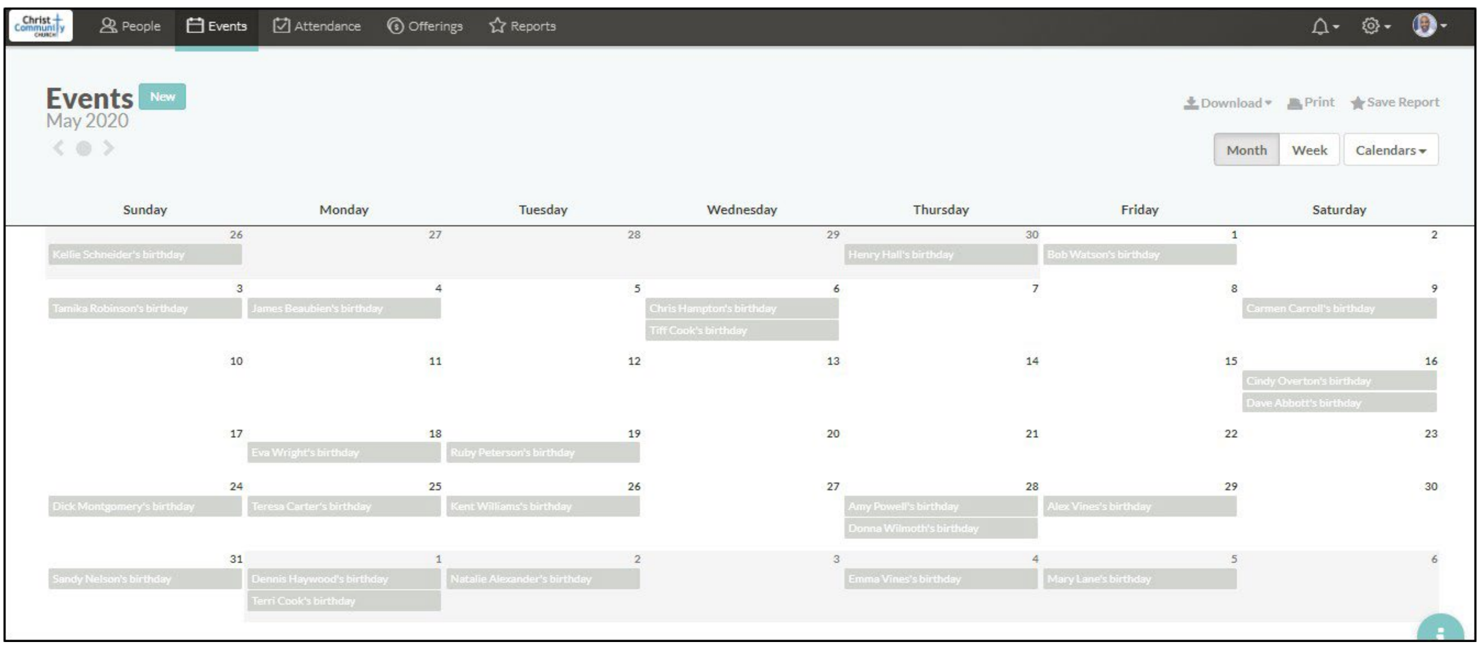
Managing events is easy in this view. To create an event, you can either click "New" in the upper left corner or click on the day you want the event to be on. A window will appear with additional fields that need to be filled in. Hovering over an event with the cursor will display a brief summary. Clicking on an event will take you to the edit view, where you can edit or delete the event.



Navigating the Events View

Properly navigating the Events view will help you manage, add, and edit your church's events efficiently and effectively.

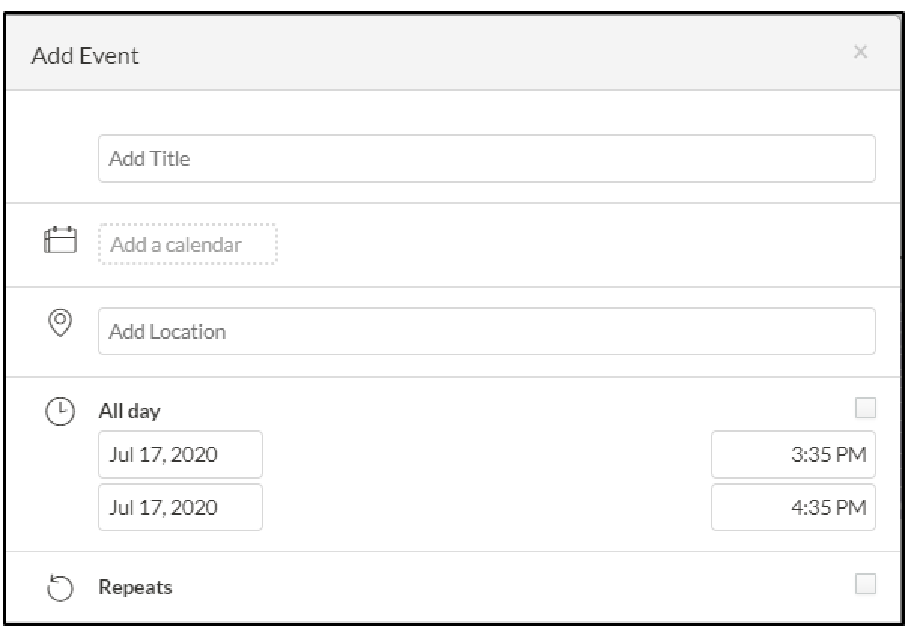
- Events can be viewed by week or by month.To switch between these views, click either the "Week" or "Month" button at the top right corner of the calendar.
- Select which calendars appear in the Events view by checking or unchecking the calendar name from the drop-down menu.
- To view today's date, click on the circle between the arrows underneath the "Events"heading.
- The arrows underneath the "Events" heading navigate forward or backward to view events that are happening in the previous or future weeks/months. Click on the left-facing arrow to move back one week/month. Click on the right-facing arrow to move forward one week/month.



Adding New Events

Events are items that are added to your calendar. In order to record attendance for worship services,Bible studies, and ministry events at your church, you must first record these items as events in Church360°Members.

1. In the Events view, click the "New" button at the top of the page to open a new window.
2. In this window, enter the name of your event in the "Name" text box.
3. Select which calendar(s) you would like to assign this event to in the "Add a calendar" box. You may tag an event to more than one calendar.
4. Type a location in the "Location" box(optional).
5. Select the start date and time.
6. Select the end date and time. If the event is an all-day event, select "This is an all-day event."
7. If the event repeats, select "This event repeats." Selecting this option will reveal additional information to be completed about how often the event occurs.
8. Add a description in the "Description" text box (optional).
9. Choose if attendance will be taken, communion will be served, or an offering will be taken at this event by checking the corresponding boxes.
0. Once all the information is correct, click the "Add" button.

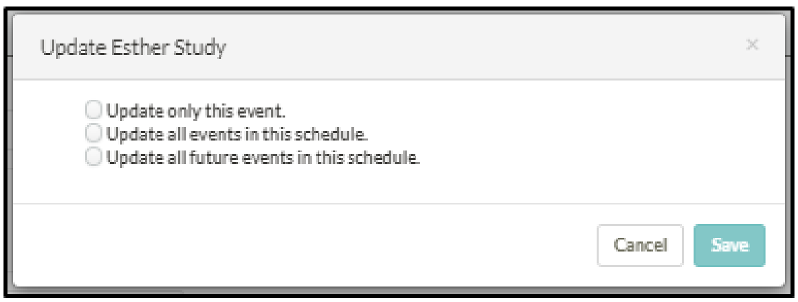


Editing Events

If you need to change information for an event, you can make those changes from the individual event's edit window.

You can make changes to a single event or recurring events. When editing recurring events, you must choose whether you want to change only the one instance of the event, all the recurring events, or all the future instances of this event.

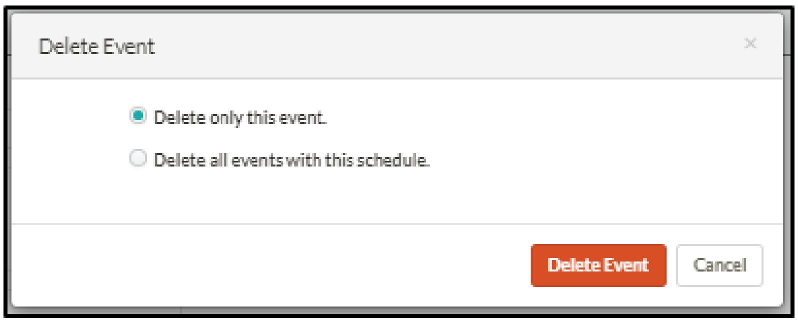
1. In the Events view, click on the event you wish to edit.
2. Make the desired change(s) to any of the event information.
3. If you are making changes to a recurring event, you need to choose if you want to make the changes for just this one event or future events as well.
4. Once you have made the desired changes,click the "Save" button at the bottom of the window.



Deleting Events

When events are cancelled or entered by mistake, you can delete the event from the individual event page.

1. In the Events view, click on the event that you want to delete in the Events calendar.
2. Click the "Delete this event" button at the bottom of the page.
3. If the event is a recurring event, select whether you wish to delete only this event or all events within the schedule.
4. Click the red "Delete Event" button to finalize your deletion.



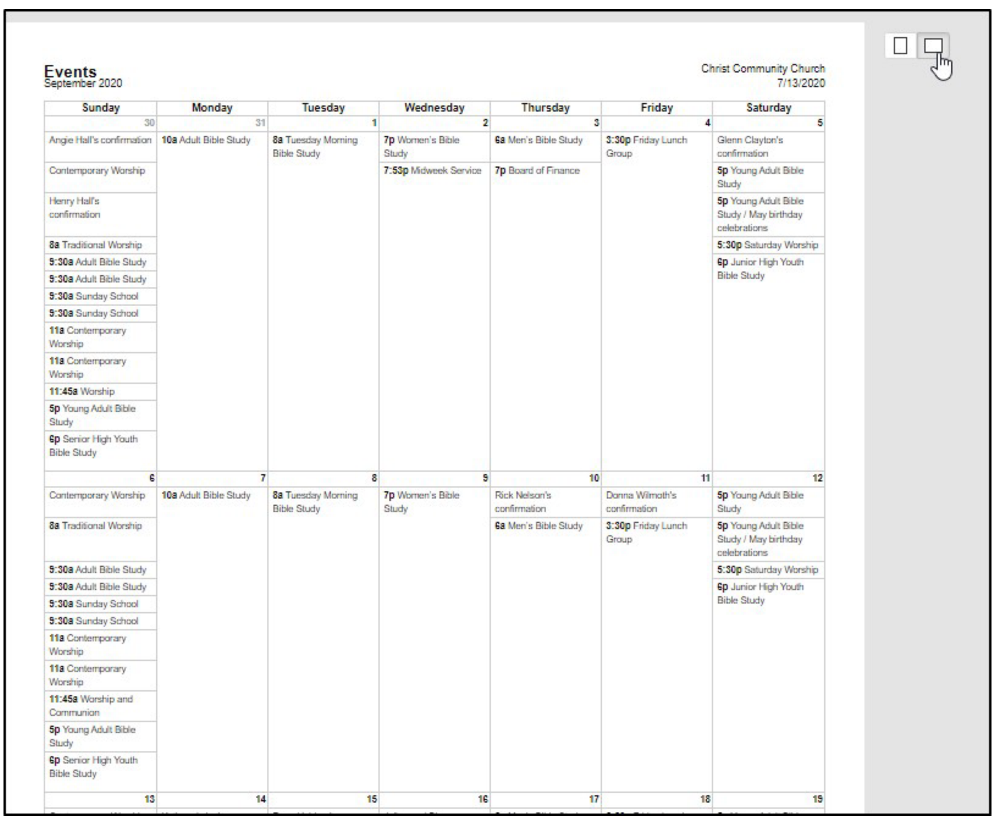
Printing an Events Calendar

Church360° Members' Print feature easily prints out your Events calendar.

You can use this feature for members of your church who desire hard copy of the Events calendar or for use on an Events bulletin board in your building.

1. In the Events view, select which month or week you would like to print.
2. Select which calendars you want to print by clicking on the Calendars drop-down menu.
3. Click "Print" in the top right corner of the screen.
4. Your calendar will open in a new window in your Internet browser. To print from this screen, press CTRL+P or "File" and "Print."

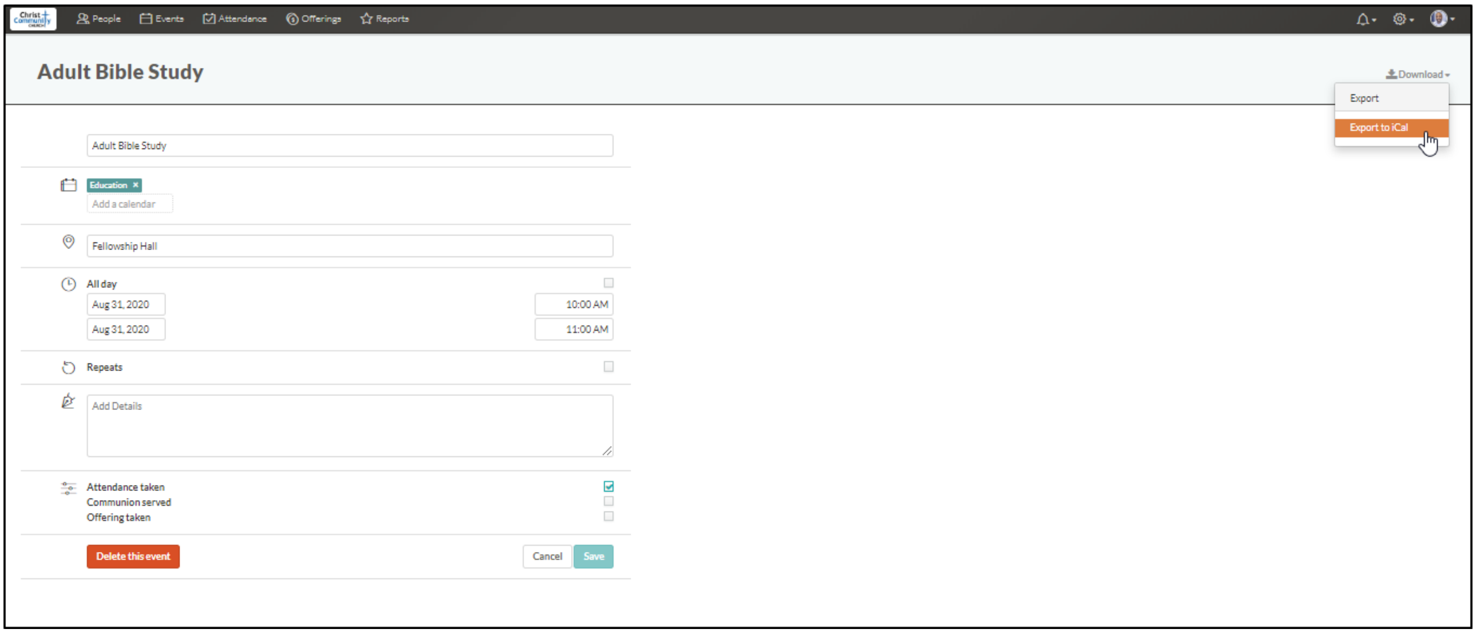
Note: In the top-right corner of this window, there is a button to switch between portrait and landscape printing. Landscape printing will allow the calendar to more easily fit on one page.



Exporting Events to iCal

Individual Church360° Members events can be exported to other programs on your phone or computer.This utility exports an event to an iCalendar file (.ics).

1. In the Events view, click on the individual event you wish to export.
2. In the top right corner, click Download" and select "Export to iCal."Your download will begin automatically.
3. Click on the file to open it.

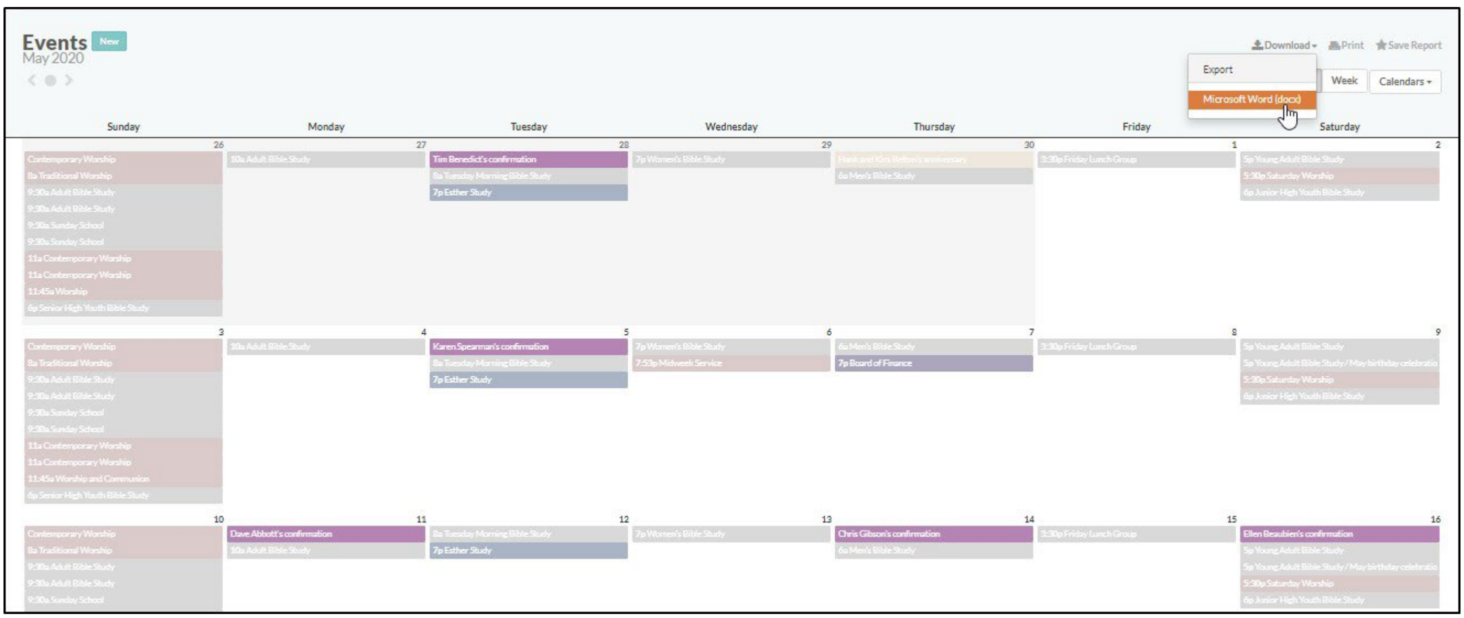


Exporting the Events Calendar to Word

In the Events view, you can print the Events calendar.

Use the export feature to make small changes to your calendar before sharing a hard copy in the church newsletter, bulletin, or other publications.

1. In the Events view, select which month or week you would like to export.
2. Select which calendars you want to view by clicking on the Calendars drop-down menu.
3. Click "Download" in the top right corner of the screen and then select "Microsoft Word(.docx)."
4. Your file will immediately begin downloading in your browser.
5. Click on the file name on your browser's download page to open your Events calendar in Word.



Attendance

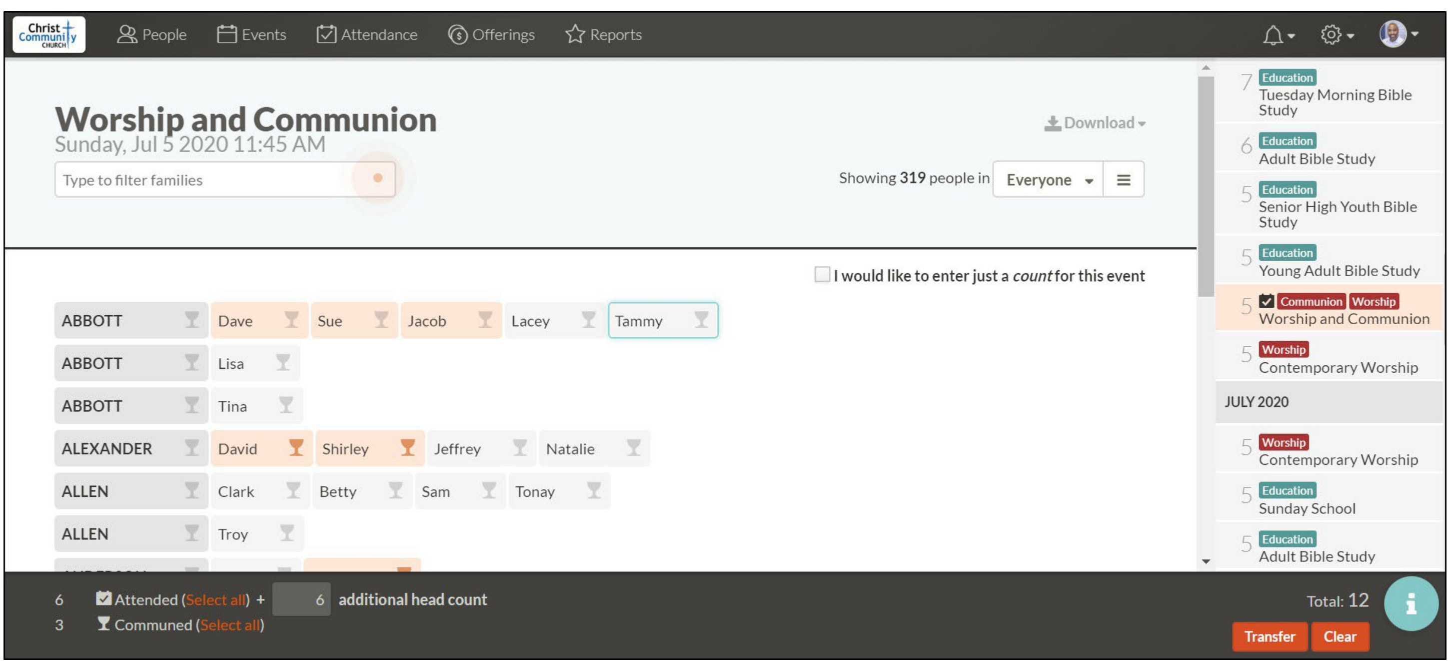
Recording Event Attendance

Keeping a record of attendance allows you to see how many people are regularly attending events at your church. This information can be used to create reports in Church360º Members that will help you assess the health of your church and the events that are offered.

Across all attendance views, orange shading indicates that a person has attended the event and gray shading indicates that a person has not attended the event.

1. Click "Attendance" in the Primary Navigation at the top of the screen.
2. Click the "Enter Attendance" button.
3. Select the event you are recording attendance for by choosing it from the list on the right side of the screen.
4. Click on a household name to mark all the members of the household as having attended.
5. Click on an individual's name to just mark that person. If all people on the list have attended, click on the orange "Select All" link next to"Attended" in the ribbon at the bottom of the screen. To select all regular attendees, click the orange "Select regulars" link next to"Attended" in the ribbon at the bottom of the screen.
6. If desired, enter a number in the "additional head count" box.

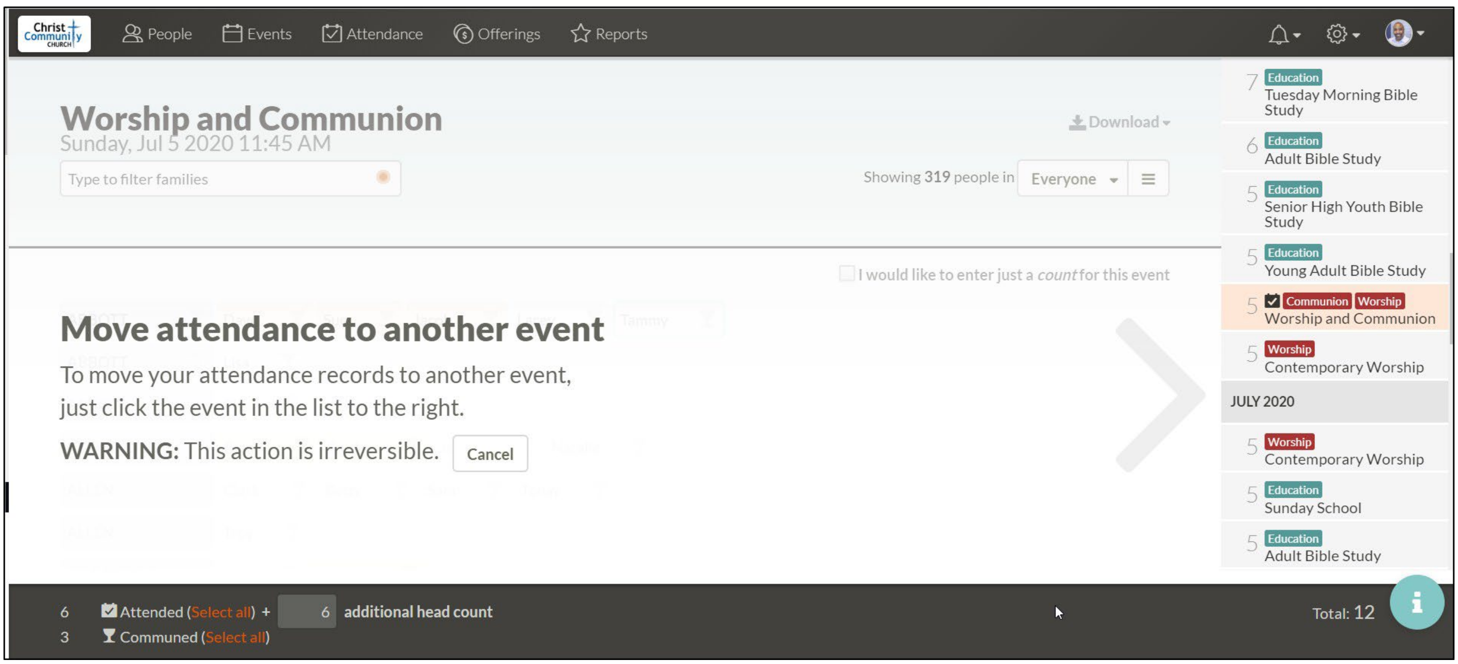
The total number for your event attendance will be recorded in the number on the right side of the screen. The program will auto-save all your changes.



Clearing or Transferring Attendance

In some instances, you may mistakenly enter the incorrect event attendance. To quickly fix these errors, use the clear and transfer attendance features.

1. Click "Attendance" in the Primary Navigation at the top of the screen.
2. On the right side of the screen, select the event you wish to clear or transfer attendance for.
3. To completely clear the event attendance,click on the "Clear" button on the bottom right corner of your screen; then click "Clear Attendance" to complete your action.
4. To transfer attendance from one event to another, click on the "Transfer" button and then select the correct event to transfer the attendance to.

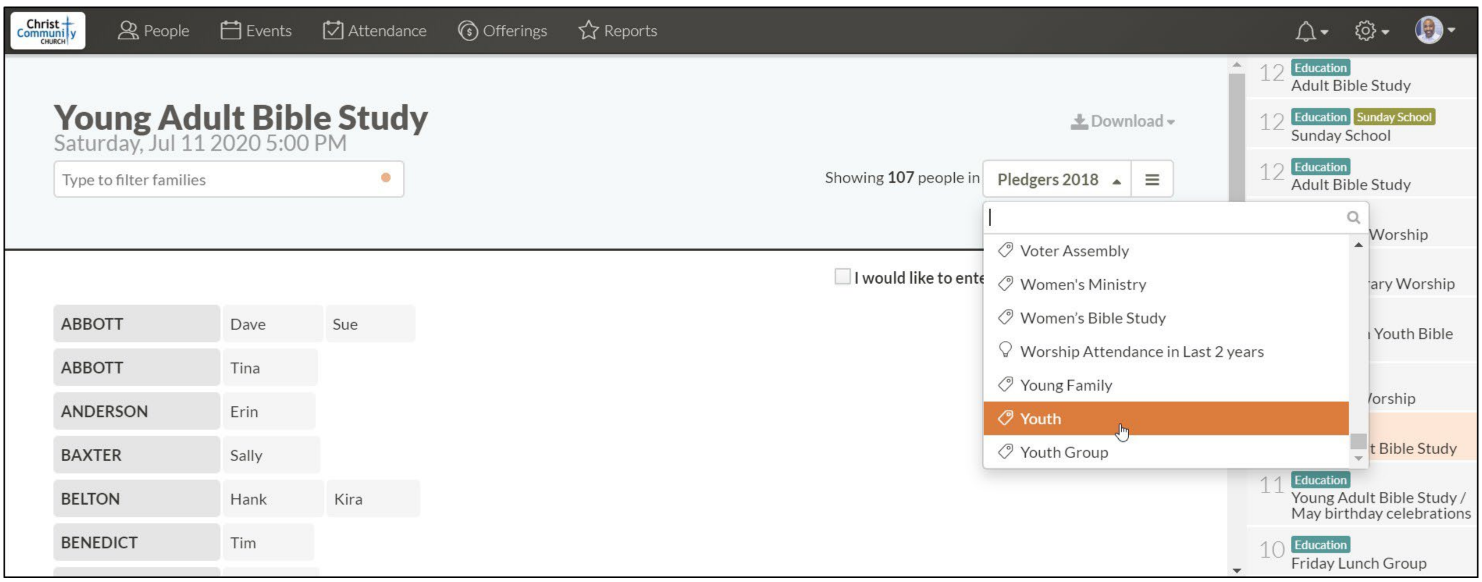


Filtering Attendance by Smart Groups

This tool allows you to enter attendance without scrolling through your entire list of people or typing in every attendee's name in the search box.

For example, you could create a Smart Group for high school students so when you enter attendance for a high school Bible study, your results are limited to only high school students.

1. Click "Attendance" in the Primary Navigation at the top of the screen.
2. On the right side of the screen, select the event you are recording attendance for.
3. Click on the Smart Groups drop-down menu located on the right side of the page.
4. Select the Smart Group you want to filter your results by.

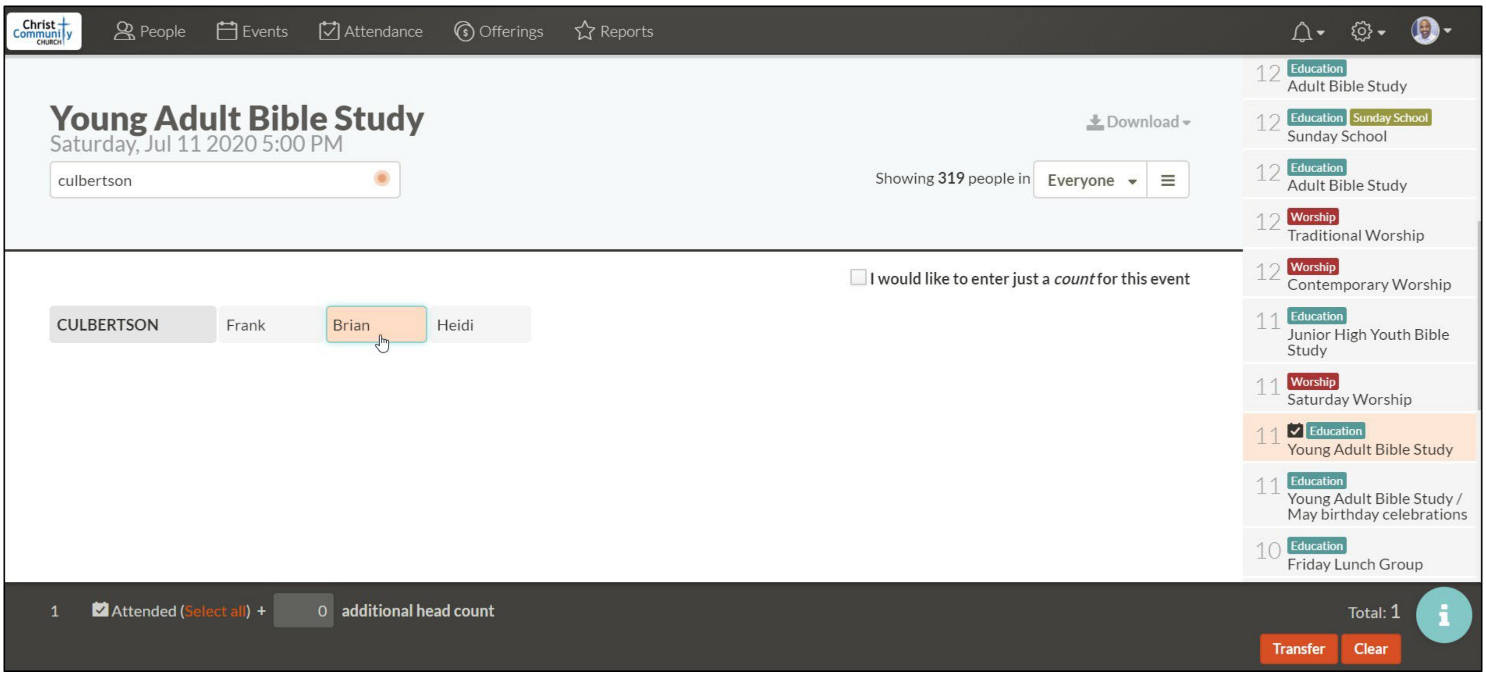


Filtering Attendance by Searching

When entering attendance, you can search for individuals or households to easily find them.

If you need to find a particular individual or household, you can search for them to add or remove them from the attendance record.This feature saves you from scrolling through your entire list of members and allows you to easily record your attendance.

1. Click "Attendance" in the Primary Navigation on the top of the screen.
2. On the right side of the screen, select the event you are recording attendance for.
3. Type in all or part of the name of the person you are looking for in the text box.
4. Church360° Members will automatically filter your results.

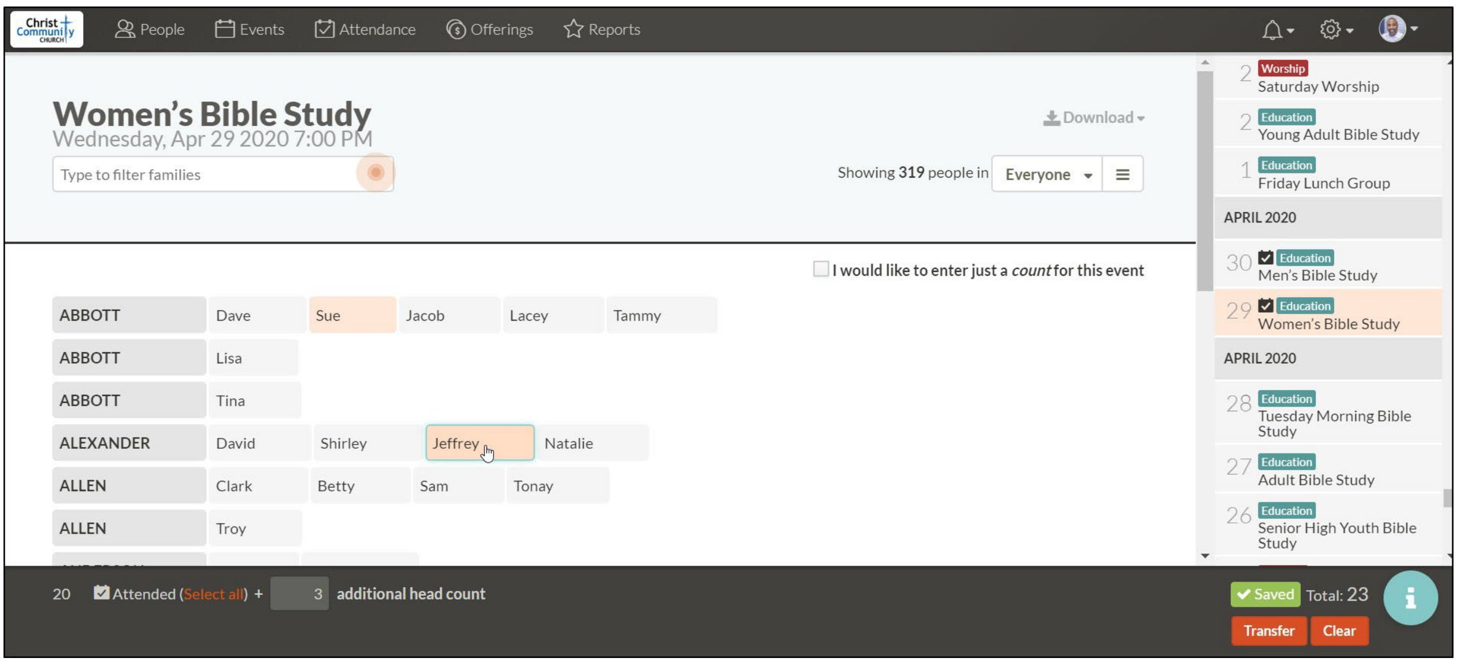


Editing Event Attendance

Attendance records can be adjusted to correct incorrect or forgotten information. You can make changes to a saved attendance record and reset any changes that have been made.

1. Click "Attendance" in the Primary Navigation at the top of the screen.
2. Click the "Enter Attendance" button.
3. On the right side of the screen, select the event you are recording attendance for.
4. Make any desired changes to attendance.

The program will auto-save all your changes.



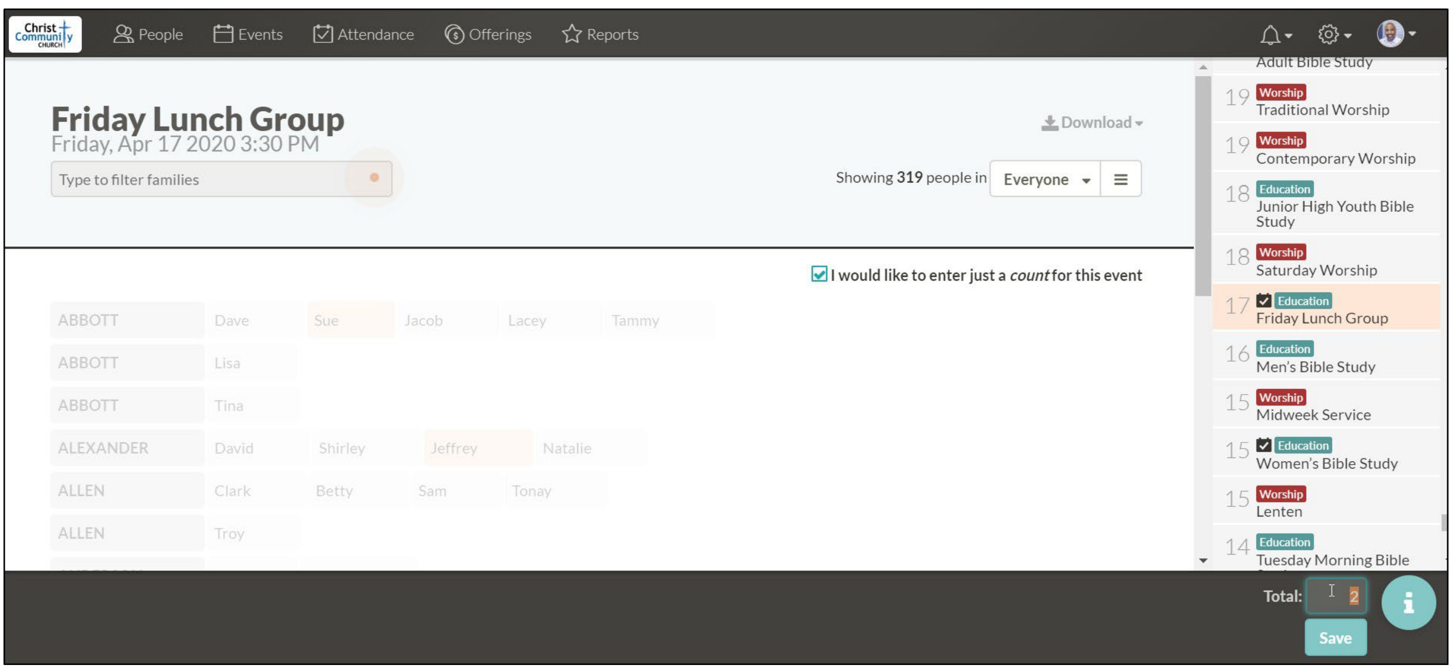
Recording Attendance Count Only

For some events, you may only need to record the number of people who attended, not the actual attendees.

For example, a dinner, auction,or community event would not necessarily require specific names of attendees. In these cases, numbers are the only information needed,especially to help plan annual events.

1. Click “Attendance” in the Primary Navigation at the top of the screen.
2. Click the "Enter Attendance" button.
3. On the right side of the screen, select the event you are recording attendance for.
4. Check the box next to “I would like to enter just a count for this event” at the top of the page.
5. Enter the number of attendees in the text box in the ribbon at the bottom of the screen.
6. Click the “Save” button on the right side of the ribbon.

Note: You can still select individuals or households as having attended and then check the count only box to enter just a count. Doing this will still save who attended the event, in case you need to review who attended, but will only display the number of attendees in the attendance records.



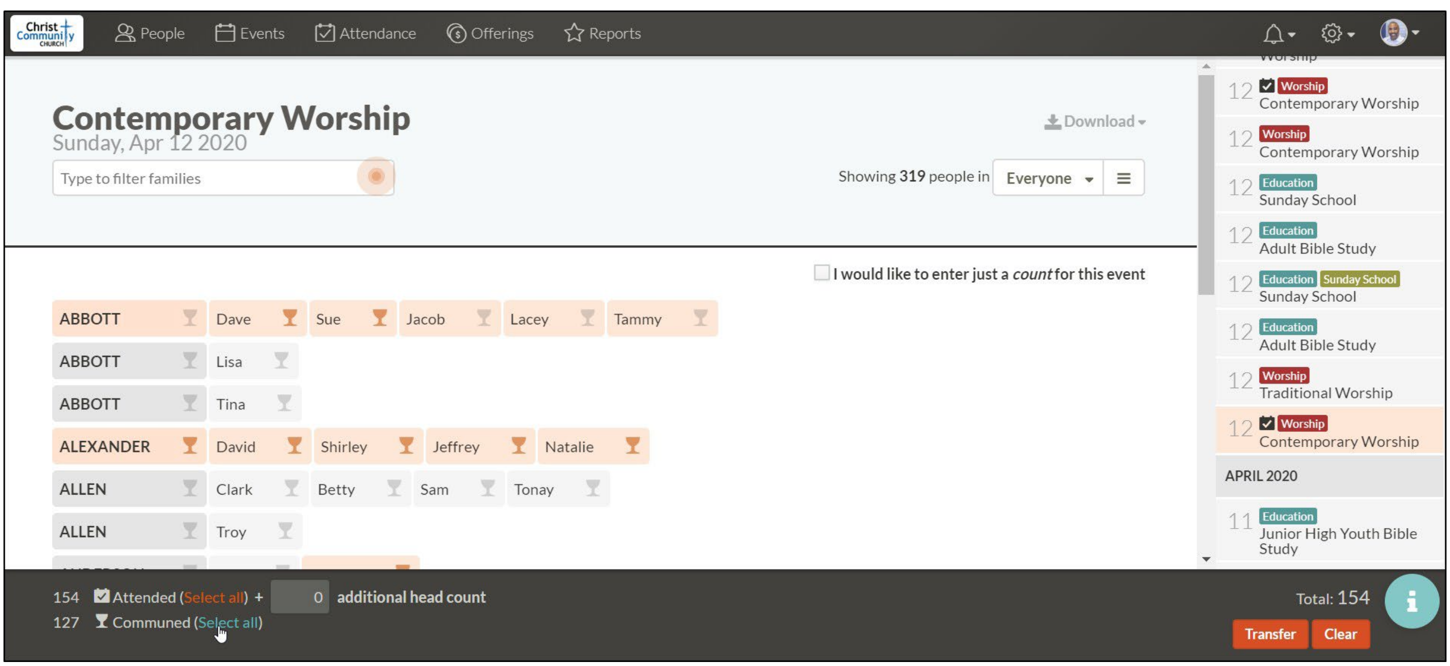
Recording Communion

For events where Communion is offered, Church360º Members allows you to record those who received Communion and when.

This feature provides altar guild members an approximate number of people communing so they can prepare enough elements, and it provides pastors with an understanding of who has not communed in a while.

1. Click "Attendance" in the Primary Navigation at the top of the screen.
2. Click the "Enter Attendance" button.
3. On the right side of the screen, select the event you are recording attendance for.
4. Communion is recorded using the chalice symbol in each box. To mark an individual ashaving communed, select the chalice next to the person's name.
5. To record Communion for a family, select the chalice next to the household name.
6. To mark everyone in the list as having communed, click on the orange "Select All"link next to "Communed" in the ribbon at the bottom of the screen. Selecting everyone as having communed will also mark everyone as having attended.

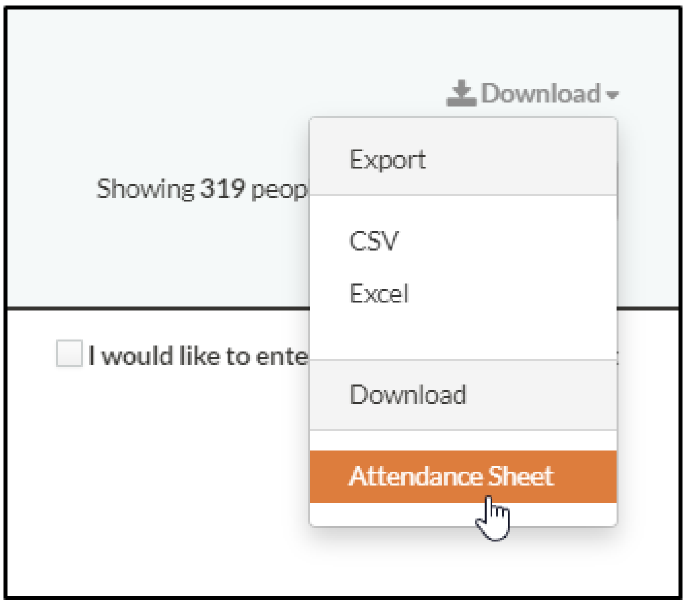
The program will auto-save all your changes.



Exporting Attendance Sheet to CSV or Excel

After recording information, you may wish to export an attendance sheet as a Microsoft Excel or CSV file to use for calling lists or other projects in your church office.

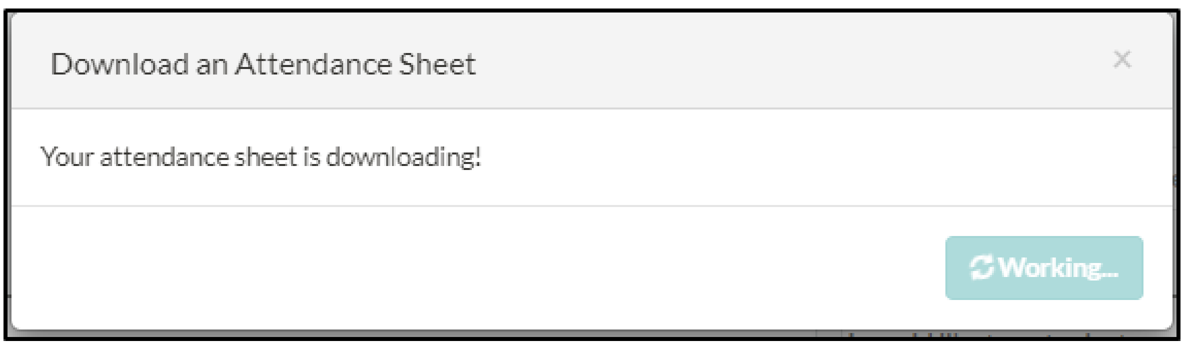
1. Click "Attendance" in the Primary Navigation at the top of the screen.
2. On the right side of the screen, select the event you wish to download attendance information for.
3. Click "Download" to select your desired format (CSV or Excel). Your attendance sheet file will begin downloading automatically.
4. Once the file is downloaded, click on the file name to open your attendance sheet.



Exporting Attendance Sheet to Word

Before an event takes place, you may wish to create an attendance sheet.The Word export can help you create pre-populated attendance sheets that can be used to record event attendance for Sunday School, Bible study, Vacation Bible School, or other activities.

1. Click "Attendance" in the Primary Navigation at the top of the screen.
2. On the right side of the screen, select the event you wish to create an attendance sheet for.
3. Click "Download," and then select the"Attendance Sheet" option. A window will pop up to let you know that your attendance sheet is generating. The Download button will turn green when your sheet is ready.
4. Click the green "Download" button and the file will be downloaded onto your computer.
5. Click on the file name to open the Attendance Sheet in Word.



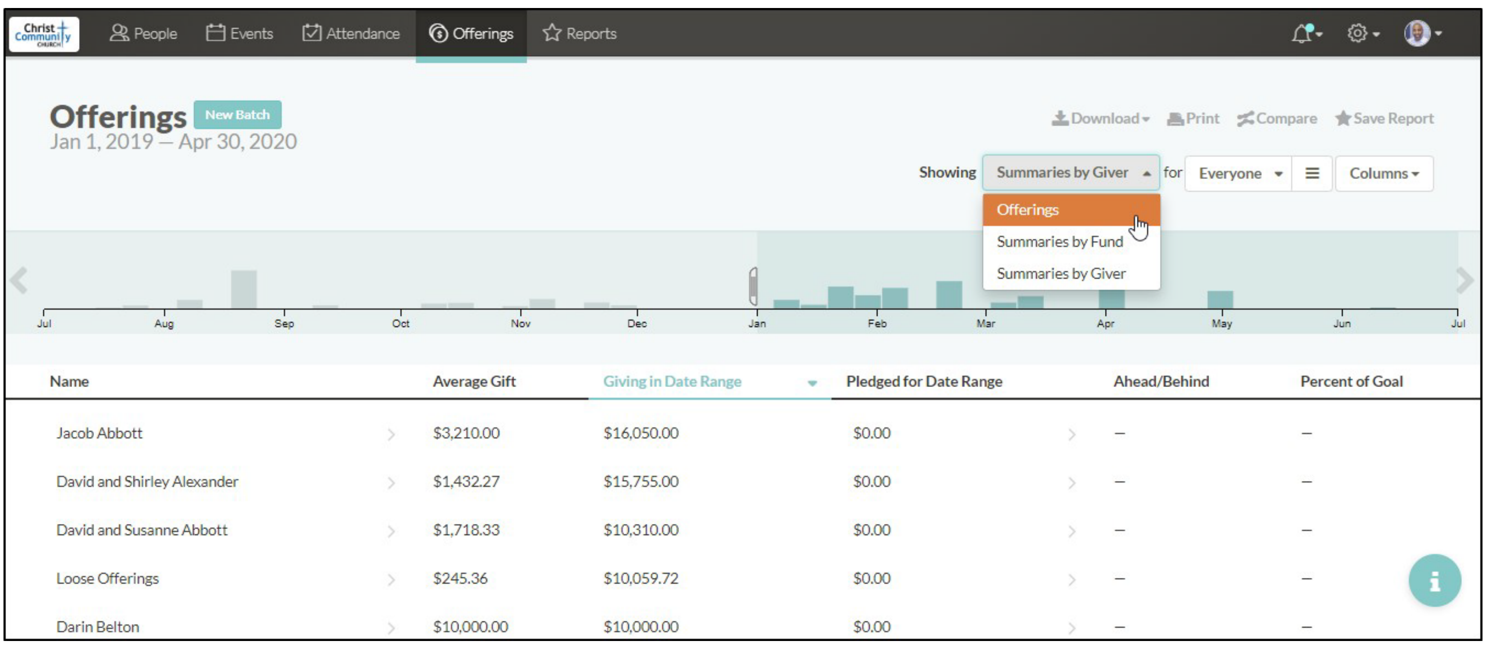
Offerings

This section gives an overview on entering and editing offerings. For articles on editing envelopes, funds, and pledges, visit our Collections area. For setting up eGiving with Vanco Integration, visit Administration.

Navigating the Offerings View

Knowing your way around the Offerings view will help you to quickly enter and access offerings information. The built-in filtering and sorting features will help you to quickly find specific offerings information.

- There are two ways to select the date range from the Offerings view. Use the Calendars selector tool by clicking on the date under the Offerings heading or use the slider at the top of the page to change your date range.
- The default offerings view displays offerings sorted by date. You may also display Offerings information with summaries by fund or by giver. Simply select your desired view using the drop-down menu on the right side of the screen.
- To filter your offerings by Smart Group,select the appropriate Smart Group from the drop-down box on the right side of the screen. You may also filter your offerings by type by clicking on the appropriate type in the type column.
- Sort your rows in the Offerings view by clicking on the column title.



Entering Offerings

In Church360° Members, you can record offerings given by certain contributors at certain events to certain funds.

1. Click "Offerings" in the Primary Navigation at the top of the screen.
2. Click the "New Batch" button next to the"Offerings" heading at the top of the page.
3. Select the date of the event and the name of the event to open the Offerings page for this specific event.
4. From here, you can record the giver's name,payment type, check number (if applicable), fund, amount, and memo. Click the "Enter" or "Return" key to save that individual offering, and enter in another offering. Church360° Members automatically updates your total.

When you return back to the main Offerings screen, your batch will be grouped together.

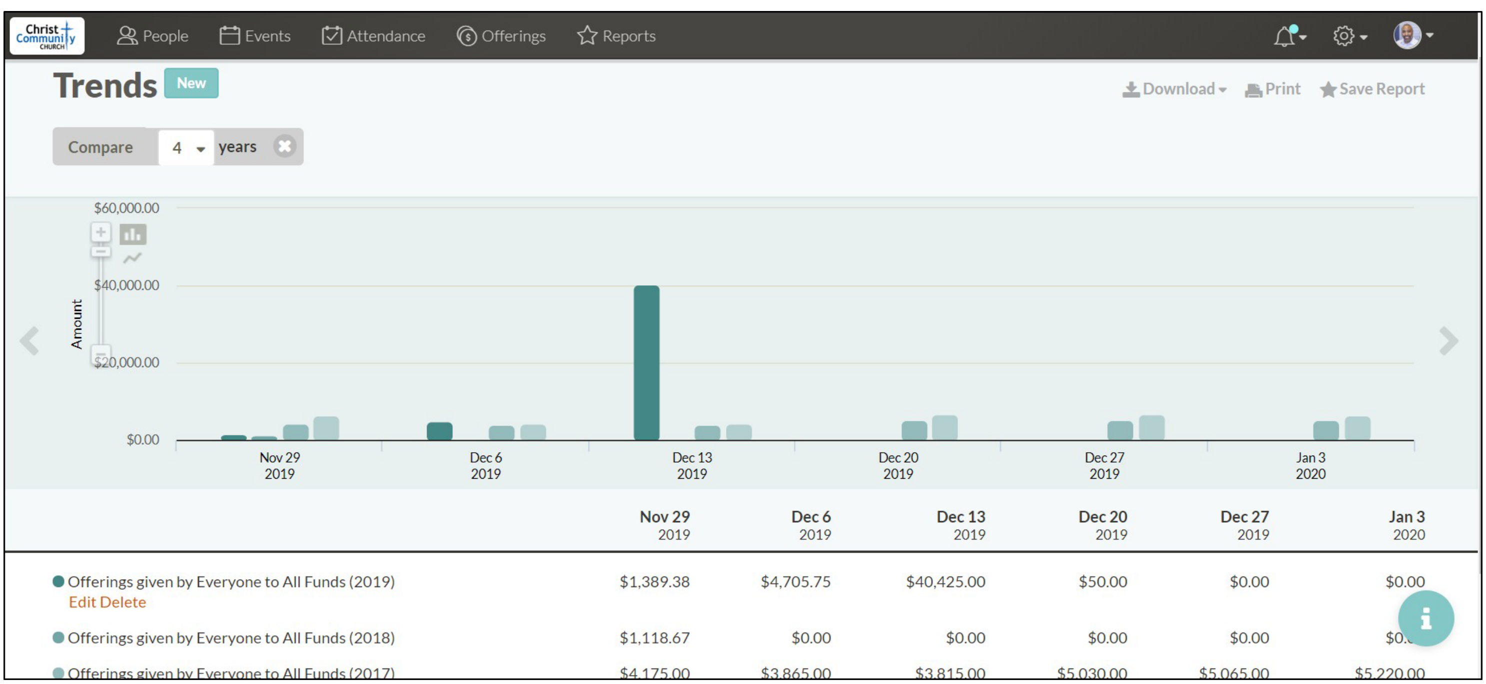
Batches of offerings will be indicated by a light orange box that appears when you hover over any offering in that batch.

Apr 12, 2020	Contemporary Worship	Teresa Carter (29)	1 - General Fund	$250.00	Electronic		$250.00
Apr 12, 2020	Contemporary Worship	Benjamin Meier (110)	1 - General Fund	$275.00	Electronic		$275.00
Apr 12, 2020	Contemporary Worship	Ruth Morgan (116)	1 - General Fund Building Fund	$175.00 $50.00	Check	3985	$225.00
Apr 12, 2020	Contemporary Worship	Richard and Sandra Nelson (122)	1 - General Fund	$300.00	Cash		$300.00
Apr 12, 2020	Contemporary Worship	Stephanie Powell (135)	1 - General Fund	$275.00	Electronic		$275.00
Apr 8, 2020	none	Rosemarie Sanders (144)	Vacation Bible School	$350.00	Cash		$350.00
Apr 8, 2020	none	James Smith (150)	Vacation Bible School	$175.00	Cash		$175.00
Apr 8, 2020	none	Elizabeth Vazquez (162)	Vacation Bible School	$50.00	Cash		$50.00
Apr 8, 2020	none	Nyla Robinson (140)	Vacation Bible School	$50.00	Cash		$50.00
Apr 8, 2020	none	Norman and Debra Roberts (138)	Vacation Bible School	$150.00	Cash		$150.00
Mar 22, 2020	Contemporary Worship	Susanne Abbott (189)	1 - General Fund	$40.00	Electronic		$40.00
Mar 22, 2020	Contemporary Worship	Loose Offerings	1 - General Fund	$20.00	Cash		$20.00
Mar 22, 2020	Contemporary Worship	Loose Offerings	1 - General Fund	$225.38	Cash		$225.3
Mar 22, 2020	Contemporary Worship	Susanne Abbott (189)	1 - General Fund	$250.00	Check	3658	$250.
Mar 22, 2020	Contemporary Worship	Julian and Blanca Vazquez (161)	1 - General Fund	$200.00	Check	32547	$275.00

Comparing Offerings Trends

Use the Offerings Trends Report to give you a graphical view of your giving history over time. Offerings trends let you view this history in bar- or line-graph format.

1. Click "Offerings" in the Primary Navigation at the top of the screen.
2. Click on "Compare." You will be taken to a Trends report.
3. Within the Trends Report view, click "Compare" again and select your desired date range. Use the bar on the left side of your screen to zoom in and out for your selected date range. Select from a bar or line graph by using the buttons to the right of the zoom bar. Use the arrows on either side of the screen to move backward and forward in time.
4. Select the appropriate funds by clicking on the "Edit" option underneath the text on the lower portion of your screen. You may enter a name for these offerings and click "Save," if desired.
5. Download, print, or save your Offerings Trends Report when ready.
6. If you wish to save the Offerings Report for future use, click on the"Save Report" option on the right side of your screen.
7. Enter the name for your Offerings Report and click "Save." The report will be saved and automatically added to your list of saved reports.
8. To access your saved report in the future, click on the Reports tab in the Primary Navigation and look for your report in the Starred Reports section.

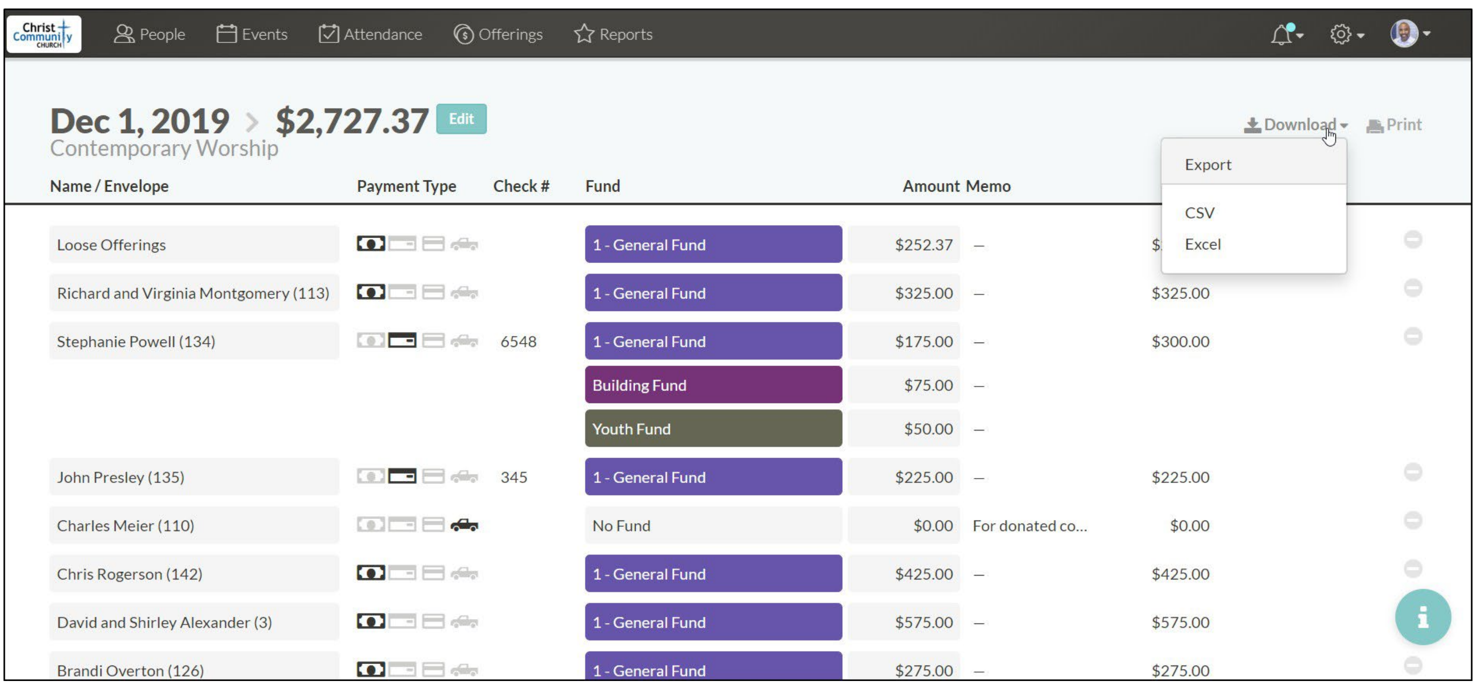


Exporting Offerings Data to CSV or Excel

After you have entered offerings for an event, you can export the data to CSV or Excel.

Exporting your Offerings data allows you to share an electronic or hard copy of your Offerings records with others.

1. Click "Offerings" in the Primary Navigation at the top of the screen.
2. Use the date slider to filter the date range of the batches.
3. Select the batch of offerings that you want to export. Church360° Members automatically groups offerings by batches.
4. Clicking on a batch will open the page for that batch.
5. Click "Download" and select either "CSV" or"Excel." Your file will automatically begin to download.
6. Once the file has been downloaded, click on the file to open it.

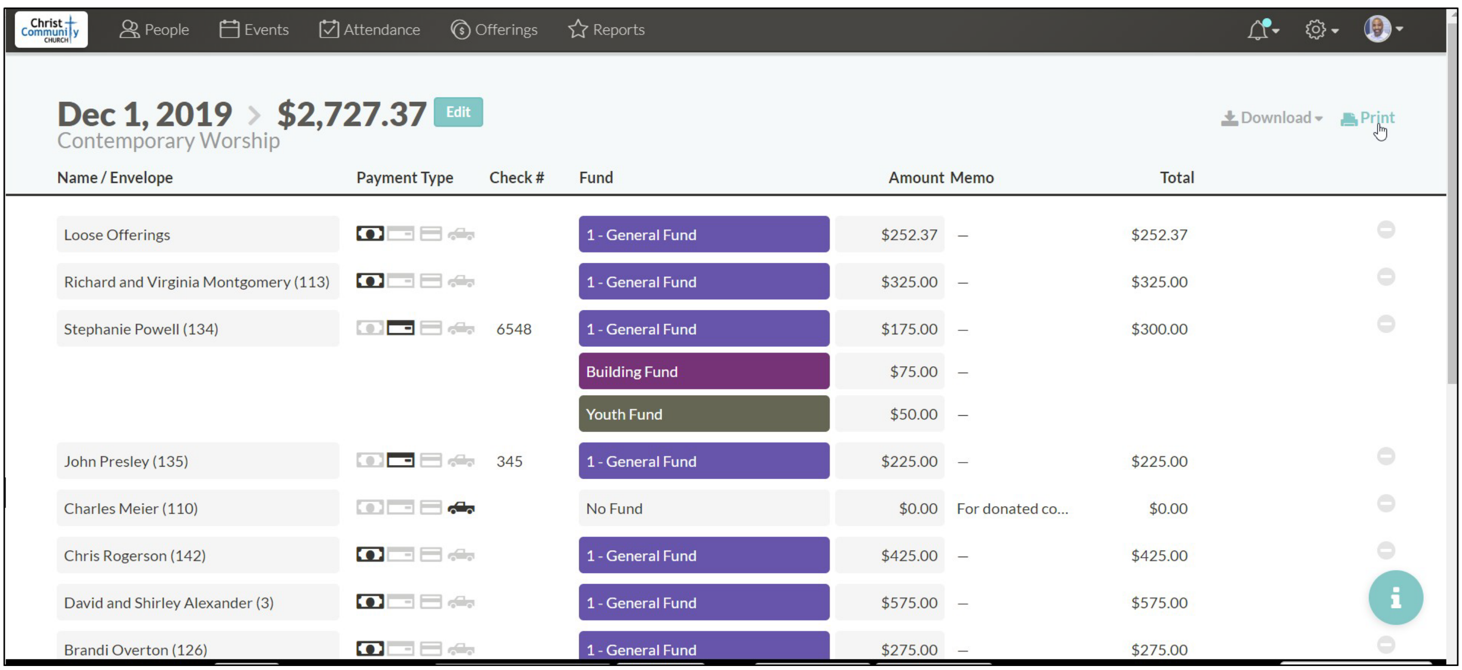


Printing Offerings Data

After you have entered offerings data,you can print off that data for a specific batch.

Printed records allow you to share hard copies of your data with others.

1. Click "Offerings" in the Primary Navigation at the top of the screen.
2. Use the date slider to filter the date range of the batches.
3. Click on the batch of offerings that you wish to print. Church360° Members automatically groups offerings by batches. Clicking on a batch will open the page for that batch.
4. In the top right corner of the page, click"Print." A printable view of your data will open in a new tab in your Internet browser. In the top-right corner of this window, there is a button to switch between portrait and landscape printing.
5. To print from this screen, click CTRL+P or select "File" and "Print."



Calendars

Adding Calendars

The Calendars feature categorizes different types of events that occur in your church. Events are assigned to different calendars to help simplify your Events page and organize your events.

1. Click the gear icon in the top right corner to access your settings.
2. Select "Calendars"from the list below.
3. Enter the name of the new calendar in the text box.
4. Choose a color for the event. This is the color that will categorize the event on the Events page.
5. Once you have the calendar configured, click the "Add Calendar" button.

Editing Calendars

Changes can be made to your calendars in the event of a typo or color confusion on the Events page.

1. Click the gear icon and select "Calendars."
2. Click anywhere in the highlighted line to enable editing.
3. Edit the name or color of the calendar.
4. Click the "Save" button.

Printing Calendars List

Printing your Calendars list may be helpful for allowing you to share a hard copy of your Calendars list with others.

1. Click on the gear icon and select "Calendars."
2. Click "Print." The view will appear in the print screen of your browser.
3. To print from this screen, click CTRL+P or "File" and "Print."

Exporting Calendars List to CSV or Excel

Exporting your Calendars list to CSV or Excel may be helpful for allowing you to share a hard copy or electronic copy of your Calendars list with others.

1. Click on the gear icon and select “Calendars.”
2. Click “Download” and then select your desired file format (CSV or Excel). Your file will automatically begin to download.
3. Once the download is complete, click on the file name to open the file on your computer.

Deleting Calendars

In Calendars settings, you can delete calendars that are no longer necessary.

1. Click the gear icon and select "Calendars."
2. Click on the gray minus sign at the end of the highlighted line.
3. Click the red "Delete" button to finalize your deletion. If you do not wish to delete the event, click on the "x."

Note: In order to delete a calendar, you must first remove all events associated with that calendar.

Church Register

Adding Register Entries

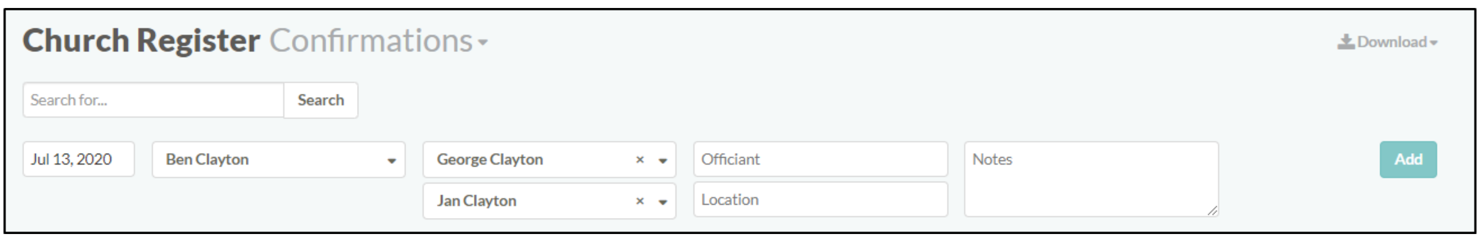
Information from your Church Register entries links with your Church360° Members database.

This means that when creating a register entries will will able to retrieve pertinent information about your current members from the Church360° Members database or add new records for those who do not yet have a individual profile.

Dates for event information in the registry also link with event information in profiles.

1. Click the gear icon and select "Church Register".
2. Use the drop-down menu to select Baptisms, Confirmations, Weddings or Funerals.
3. Enter in the information for the selected event type.
4. Click "Add" to enter the event into the Church Register.

Note: The only required information for register entries is the Date, Individual name, Couple's name (for Weddings), and death date (for Funerals).



Deleting Register Entries

Events that get added to the Church Register can be deleted.

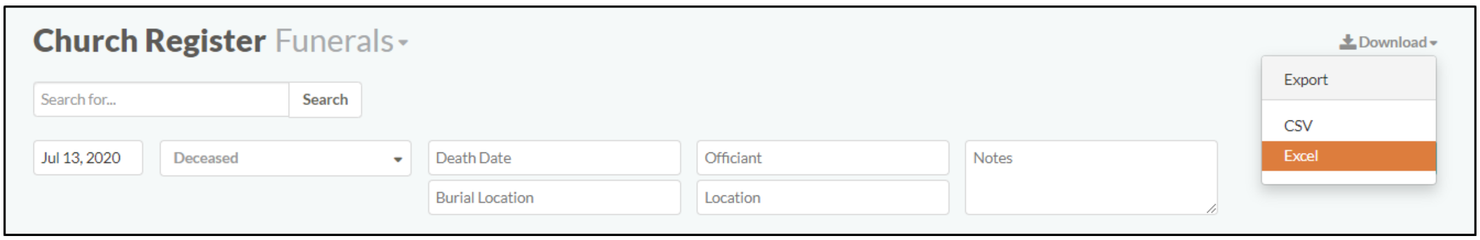
Use the delete option to consolidate duplicate entries or remove entries that may have been mistakenly added.

1. Click the gear icon and select "Church Register".
2. Select the event type where you need to delete your record from.
3. Click on the gray minus sign to the right of the event name.
4. Click the red "Delete" button to confirm your event deletion.

Exporting the Church Register to CSV or Excel

Exporting your Church Register maybe helpful for allowing you to share a hard copy or electronic copy of your register information with others.

1. Click the gear icon and select "Church Register".
2. Use the drop-down menu to select Baptisms, Confirmations, Weddings or Funerals.
3. Click the "Download" option and then select your desired file type (CSV or Excel). Your Church Register will automatically generate and download.
4. Click on the file name to open your Church Register.



Custom Fields

Adding Custom Fields

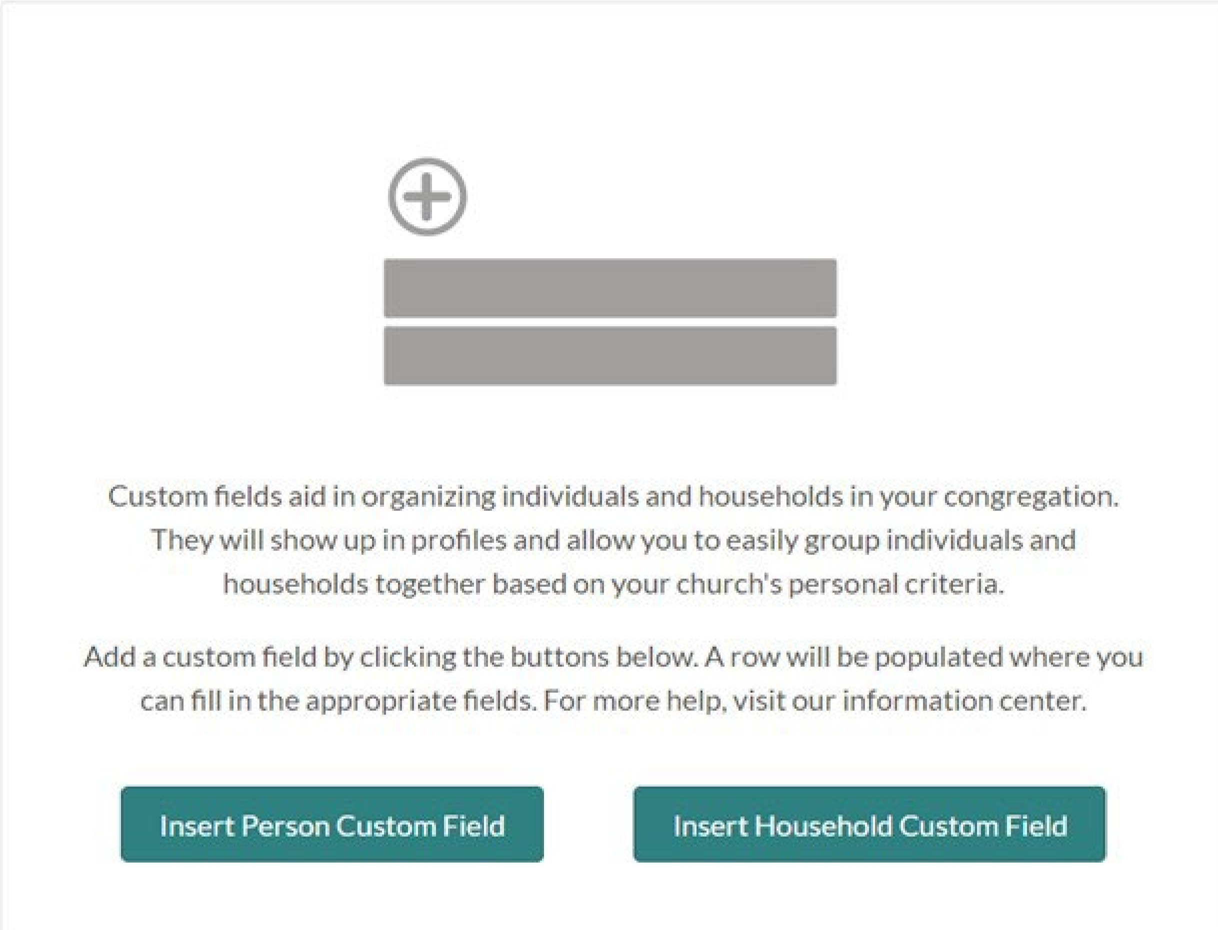
While using Church360° Members, you may find that there is some information that you would like to record but can't find an appropriate field. In this situation, custom fields can be created to record information that is specific to your church.

You may add an unlimited amount of both individual and household custom fields of the following types:

- **Text** - This field type allows users to type into a text box in a person or household record, for a maximum of 255 characters. This type could include fields like Allergies, Employer, or Job Title.
- **Date** - This field type accepts dates through use of a calendar-like pop-up. A field for a person's first visit or communion might be information you'd like to add using this type.
- **List** - Similar to the text box, this field restricts the options to be chosen, shown in a drop-down menu when entering data. You could use this to show a list of Elders or Ministry Groups to choose from. This type can also be used as a true or false distinction as well. Putting Yes or No as the options for something like Background Check Passed or Receives Newsletter could be fields to add, depending on your church's needs.
- **Link** - This final type will create a hyperlink that can be clicked while in a person or household record. These links might take you to a person's FaceBook page or personal website.

To add your first custom field,

1. Click the gear icon on the Primary Navigation at the top of the screen.
2. Select "Custom Fields"
3. If you want the field to show in the People: Individuals view, like a school or occupation field, click the "Insert Person Custom Field" button. If you want the field to appear in the People: Households view, like a newsletter or mailing list, click the "Insert Household Custom Field".
4. Type the name of your new field in the Name box.
5. Select a type for your custom field. You may choose from text, date, list, or link options.
6. Select the visibility for your custom field. Visibility for custom fields is tied to roles you create in Church360° Members.
7. Click "Save" to save your changes.



To add a new custom field,

1. Click the gear icon on the Primary Navigation at the top of the screen.
2. Select "Custom Fields"
3. If you want the field to show in the People: Individuals view, like a school or occupation field, click plus sign next to People Fields. If you want the field to appear in the People: Households view, like a newsletter or mailing list, click the plus sign next to Household Fields.
4. Type the name of your new field in the Name box.
5. Select a type for your custom field. You may choose from text, date, list, or link options. If you click the list type, you will be able to type in your options on each line in the box that appears beneath the type field.
6. Select the visibility for your custom field. Visibility for custom fields is tied to roles you create in Church360° Members.
7. Click "Save" to save your changes.

Custom Fleld:S

P\oopl<F-

Name		Visible To	
School or Occupation	!!!!!	Administrators only	0-

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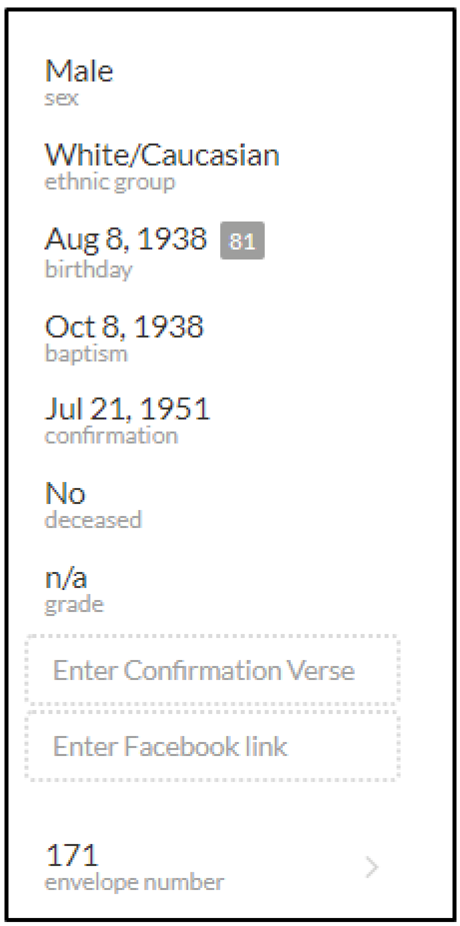
Updating Custom Fields Information in a Profile

After adding a Custom Field, you may wish to populate that field in profiles.

1. Select the profile of the individual or household whose custom field you wish to update.
2. Navigate to the personal information portion on the right side of the individual profile and enter the text for your custom field. The entry will save automatically.
3. If you wish to view a list of people utilizing this custom field, you can either create a Smart Group or return to the Custom Fields portion of the General Settings section to access the list.



Deleting or Deactivating Custom Fields

Custom Fields may be created to record information that is specific to your church. You may wish to delete or deactivate custom fields that no longer fit your congregation's needs.

1. Click the gear icon on the Primary Navigation at the top of the screen.
2. Select "Custom Fields" in Collections.
3. Select the minus icon of the field you wish to delete or deactivate on the right side of the screen. If you delete the custom field, it will be removed from all profiles and information from that field will be lost. If you deactivate the field, it will no longer appear in individual profiles, but the information will still be stored in Church360°Members.
4. Click "Save" to save your changes.

Envelopes

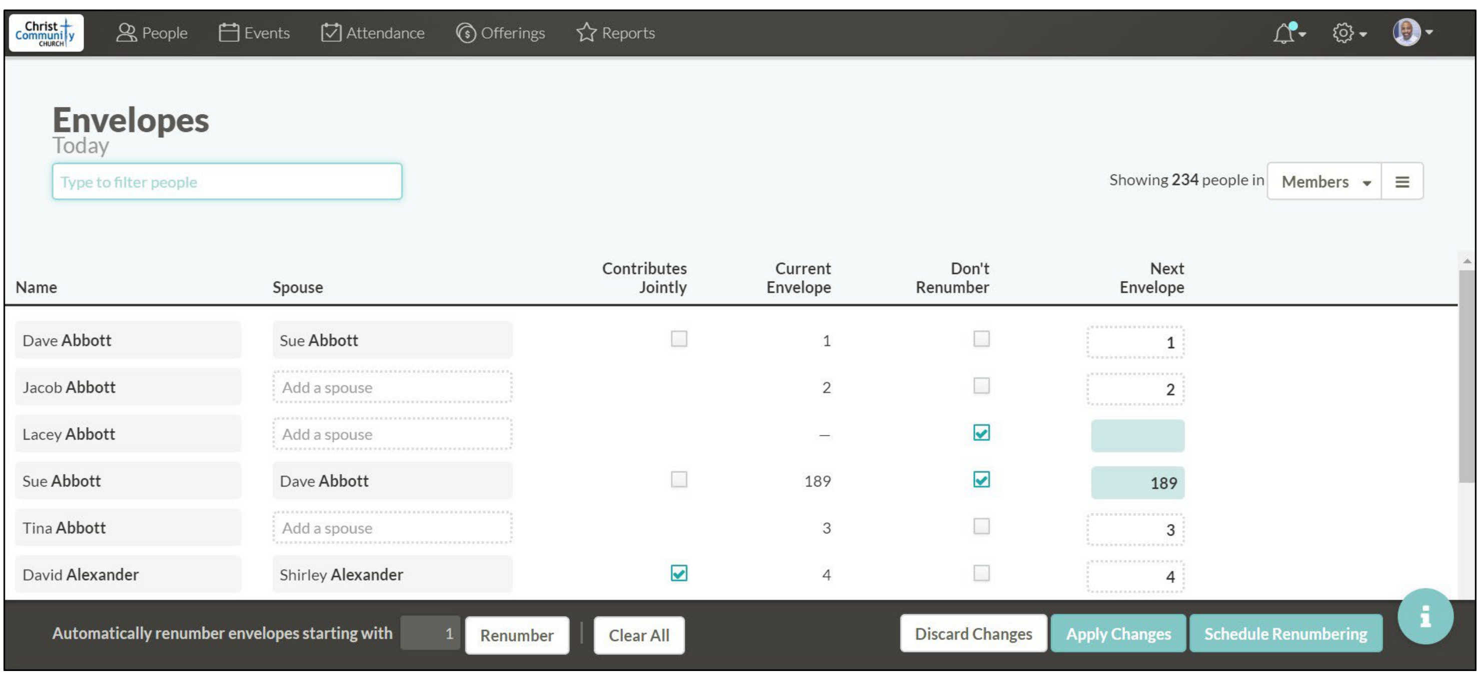
Adding and Editing Envelope Numbers

You can manage envelope numbers by adding or editing envelope-number assignments. This feature allows you to assign envelope numbers to new members or reassign individual envelope numbers.

You can also choose to change envelope numbers now, or to schedule changes to take effect later. In the Envelopes view, you can schedule and view envelope numbers for one date in the future.

1. Click the gear icon and select "Envelopes."
2. Find the name of the person whose envelope number you wish to adjust.
3. To assign a new envelope number, type in the new envelope number in the text box under "New Envelope."
4. If you wish to add a spouse for the contributor, add the spouse's name in the"Spouse" box. The "Contributes Jointly" box will be automatically selected when you do this.
5. In the ribbon at the bottom of the screen, choose when you want your changes to take effect; choose "Apply Now" or "Apply Later."

Note: If the new envelope number already exists for another person, you will be notified of this and asked to choose a different number.

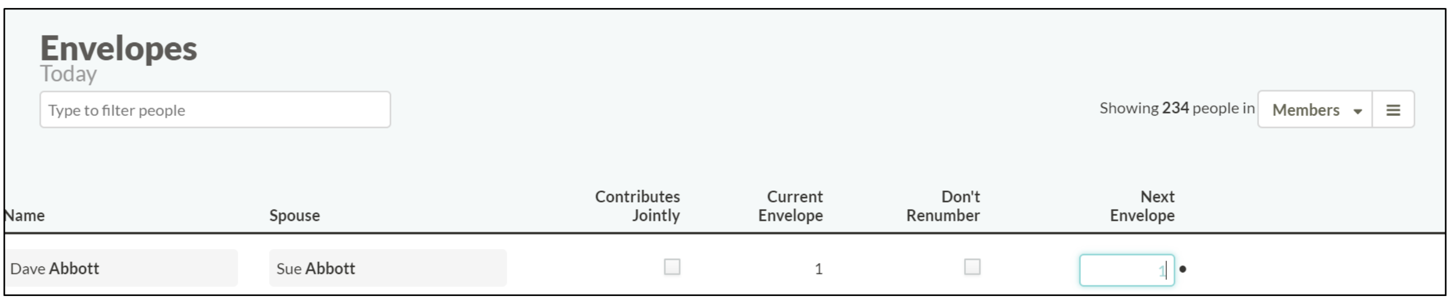


Removing Envelope Numbers

You can manage envelope numbers by adding or removing envelope-number assignments. This feature allows you to remove envelope numbers from members who have transferred out of your congregation.

You can also choose to remove envelope numbers now, or to schedule changes to take effect later. In the Envelopes view, you can schedule and view envelope numbers for one date in the future.

1. Click on the gear icon and select "Envelopes."
2. Find the name of the person whose envelope number you wish to adjust.
3. Delete the number in the text box under "New Envelope."
4. In the ribbon at the bottom of the screen, choose when you want your changes to take effect; choose "Apply Now" or "Apply Later."

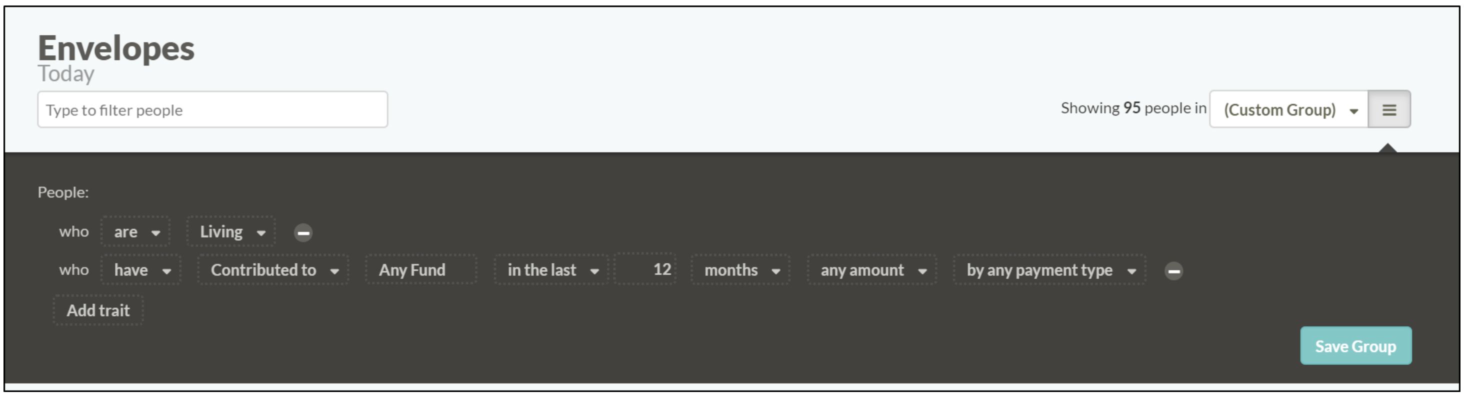


Filtering Envelope Numbers

When you are working in the Envelopes page, you can filter by name or Smart Group to quickly find people in the list.

This feature saves you from having to scroll through your entire list to find one individual or household.

1. Click the gear icon and select a tag.
2. To search for people by name, type the name into the search text box underneath the"Envelopes" header.
3. To filter by Smart Group, click on the Smart Groups drop-down menu and select the desired Smart Group.



Automatically Renumber Envelope Numbers

In Church360° Members, you can renumber envelope numbers for all members of your congregation.

This feature allows you to quickly assign envelope numbers to large amounts of people.

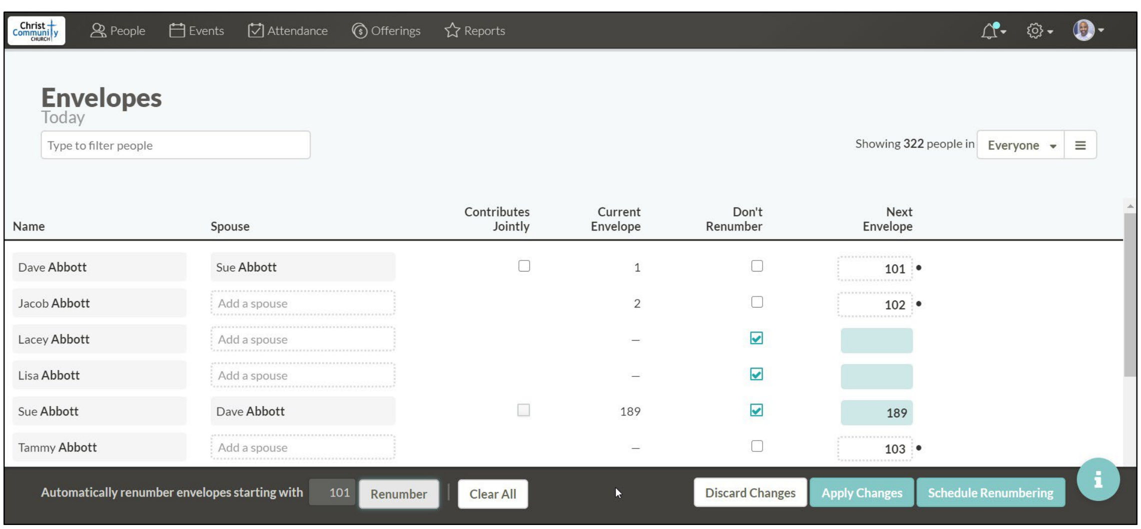
You can also choose to change envelope numbers now, or to schedule changes to take effect later.

In the Envelopes view, you can schedule and view envelope numbers for one date in the future.

Next to each person in your list, there is a "Don't Renumber" option for those givers who you want to exclude from the renumbering process.

A light blue help text will appear in the"New Envelope" number box, which will prompt you as to the next available envelope number.

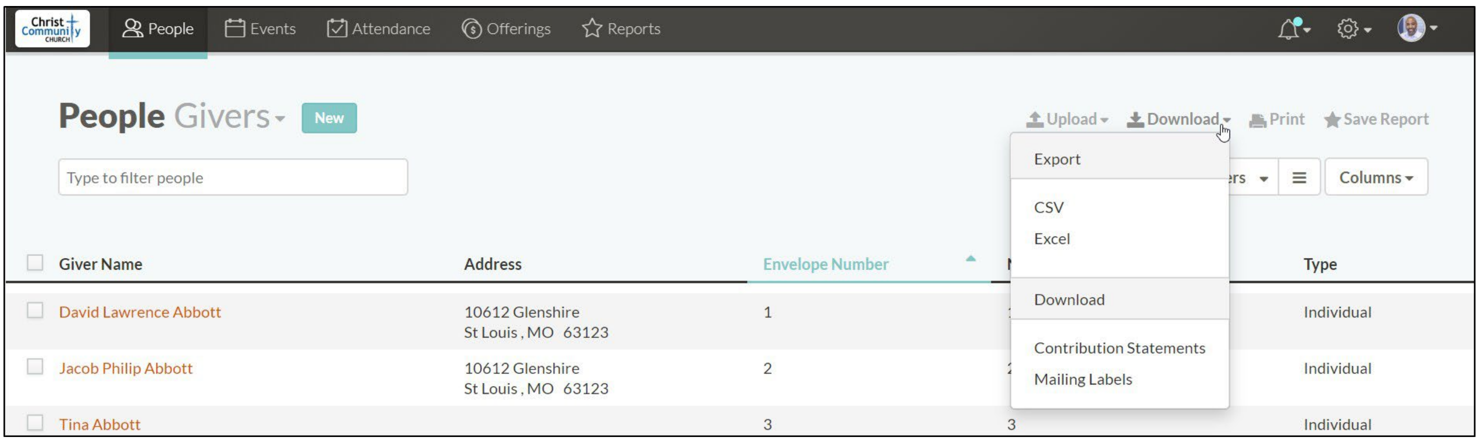
1. Click the gear icon and select "Envelopes."
2. Enter in the first envelope number you wish to begin with in the text box in the ribbon at the bottom of the screen. For example, if your envelopes begin with 1, then the second person's envelope number would be 2, and so on.
3. Click the "Renumber" button in the ribbon at the bottom of the screen.
4. If you do not like your renumbering changes,click the "Discard Changes" button, and the numbers will return to their original state.
5. Once you are satisfied with your new envelope numbers, click the "Apply Now" or "Apply Later" button.



Exporting Envelopes List to CSV or Excel

Exporting your Envelopes List maybe helpful for allowing you to share a hard copy or electronic copy of your Envelopes list with others.

1. Click on the People view and select "Givers"mode.
2. From within the Givers mode, click the"Download" option and then select your desired file type (CSV or Excel). Your envelopes list will automatically generate and download.
3. Click on the file name to open your list of envelopes.



Funds

Adding Funds

The Funds feature organizes your Offerings data to ensure they are given to their specific purpose.

As new needs in your church arise,funds can be created to reflect those needs, such as a building fund for a new sanctuary.

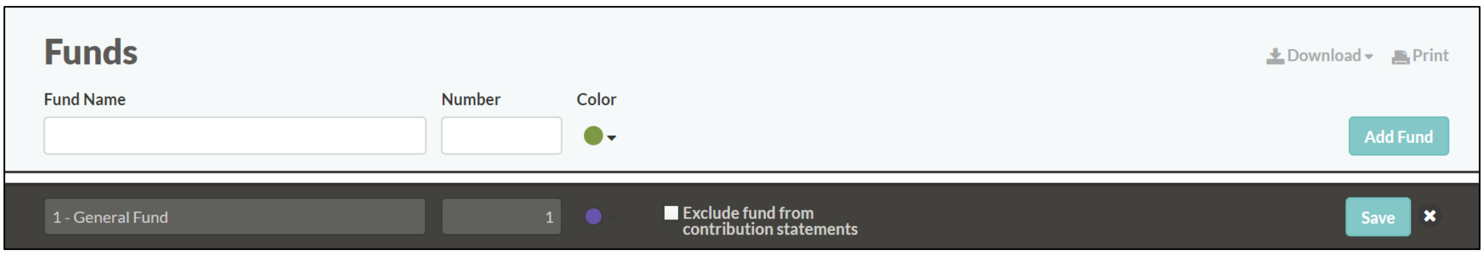
1. Click on the gear icon and select "Funds."
2. Type in the name of the new fund in the"Fund Name" text box.
3. If desired, add a number for the new fund.
4. Select the desired color for the fund by clicking on the colored circle.
5. Click the "Add Fund" button to save your fund.

Editing Funds

You can make changes to Funds lists that you have already created.

To fix a typo or error, you can edit a fund's name, number, or color at anytime.

1. Click on the gear icon and select "Funds."
2. Click on the fund's name to enable editing on any aspect of the fund.
3. Change the name, number, or color of the fund.
4. Click the "Save" button on the right side of the page.



Deactivating Funds

It is not possible to delete funds after offerings have been associated with them. However, you can deactivate funds that are no longer in use but have had offerings assigned to them in the past.

1. Click the gear icon on the right of the Primary Navigation at the top of the screen. Select "Funds."
2. Click the gray minus sign on the right side of the fund line.
3. Click the "Deactivate" button. The name of the fund will be crossed out, but it will still appear in your Funds list.

Reactivating Funds

You can reactivate funds that have been deactivated if the need arises to use those funds again.

1. Click on the gear icon and select "Funds."
2. Click the gray plus sign on the right of the fund line.
3. Click the "Restore" button.

Exporting Funds List to CSV or Excel

Exporting your Funds list to CSV or Excel may be helpful for allowing you to share an electronic or hard copy of your Funds list with others.

1. Click on the gear icon and select "Funds."
2. From within the Funds view, click the"Download" option and then select your desired file type (CSV or Excel). Your Funds list will automatically generate and download.
3. Click on the file name to open your list of Funds in CSV or Excel format.

Printing Funds List

Printing your Funds list may be helpful for allowing you to share a hard copy of your Funds list with others.

1. Click on the gear icon and select "Funds."
2. Click "Print." The view will appear in the print screen of your browser.
3. To print from this screen, click CTRL+P or"File" and "Print."

Note: In the top-right corner of the print window,there is a button to switch between portrait and landscape printing.

Funds

Christ Community Church
7/13/2020

Fund Name	Number	
1 - General Fund	1	$39,040.67 year-t…
~~Building Fund~~	4	$2,157.00 year-to…
Church at Large	11	$0.00 year-to-date
Daycare *This fund will be excluded from contribution statements.*	15	$0.00 year-to-date
Education	6	$425.00 year-to-d…
Furnishing *This fund will be excluded from contribution statements.*		$0.00 year-to-date
Memorial Fund		$0.00 year-to-date
Mens Ministry	8	$0.00 year-to-date
Mission Fund	2	$1,375.00 year-to…
Mission Trip	14	$197.00 year-to-d…
Music Ministry	7	$0.00 year-to-date
Scholarship Fund	13	$0.00 year-to-date
Social Concerns	12	$0.00 year-to-date

Pastoral Visits

Adding Pastoral Visits

Pastoral Visits can be easily recorded from the Pastoral Visits page.

This feature allows visits to be recorded so that pastors can keep track of whom they have seen,haven't seen, and should be visiting next.

1. Click on the gear icon on the right side of the top menu.
2. Select "Pastoral Visits."
3. Type in the date, or use the calendar to select the date of the visit.
4. Type in or scroll to find the name of the visitee in the "Visited" drop-down box.
5. Type in the names of the visitors in the "Visited by" box. You can tag multiple visitors to one visit.
6. Enter in the type of visit in the "Type(s)" box. You can add multiple Types to one visit.
7. When all information is correct, click the "Add Visit" button.

Editing Pastoral Visits

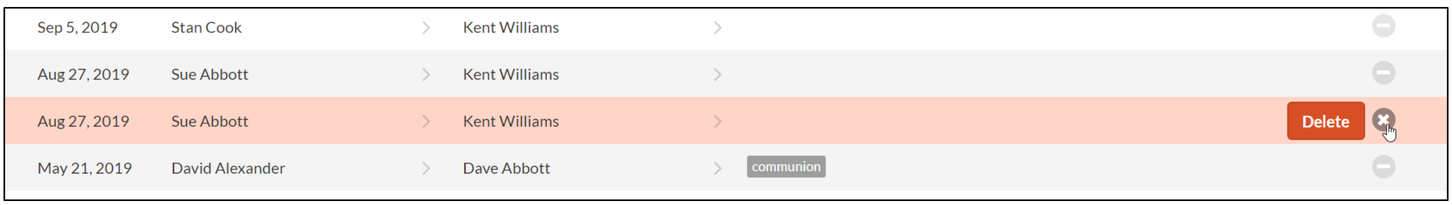
If you ever make a mistake or need to tweak a Pastoral Visits record that you already entered, you can easily make changes to the record.

1. Click on the gear icon in the right side of the top menu.
2. Select "Pastoral Visits."
3. On the right side of the page, click on the "Last Visited" link to open the Pastoral Visits page for the individual or household.
4. To open the edit window, click on the line of the pastoral visit you need to edit.
5. From here, you can click and edit any information about the visit.
6. Click the "Save" button when all information is updated.

Deleting Pastoral Visits

If you ever make a mistake or need to delete a Pastoral Visits record that you already entered, you can easily make changes to the record.

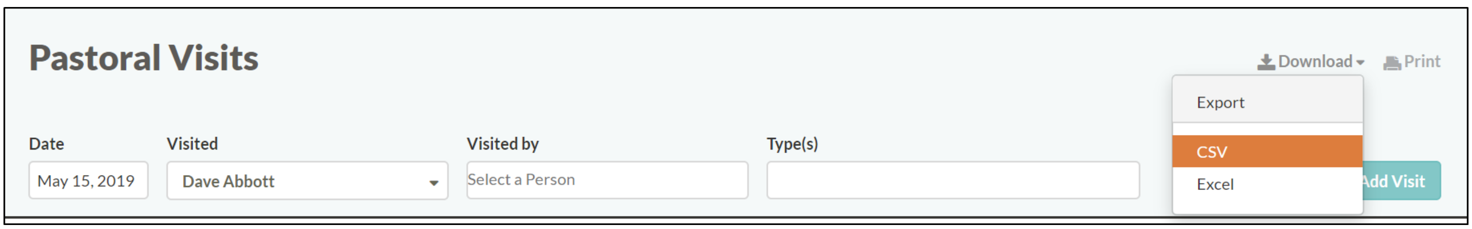
1. Click on the gear icon on the right side of the top menu.
2. Select "Pastoral Visits."
3. On the right side of the page, click on the "Last Visited" link to open the Pastoral Visits page for the individual or household.
4. To open the edit window, click the gray minus sign in the line of the pastoral visit you need to delete.
5. Click the red "Delete" button again to confirm your deletion.



Exporting Pastoral Visits List to CSV or Excel

Exporting your Pastoral Visits list to CSV or Excel may be helpful for allowing you to share an electronic or hard copy of your Pastoral Visits list with others, such as your elders.

1. Click the gear icon on the right of the Primary Navigation at the top of the screen.
2. Select "Pastoral Visits."
3. From within the Pastoral Visits view, click the "Download" option and then select your desired file type (CSV or Excel). Your Pastoral Visits list will automatically generate and download.
4. Click on the file name to open your list of Pastoral Visits in CSV or Excel format.



Printing Pastoral Visits List

Printing your Pastoral Visits list can be helpful for allowing you to share a hard copy of your Pastoral Visits information with others, such as your elders.

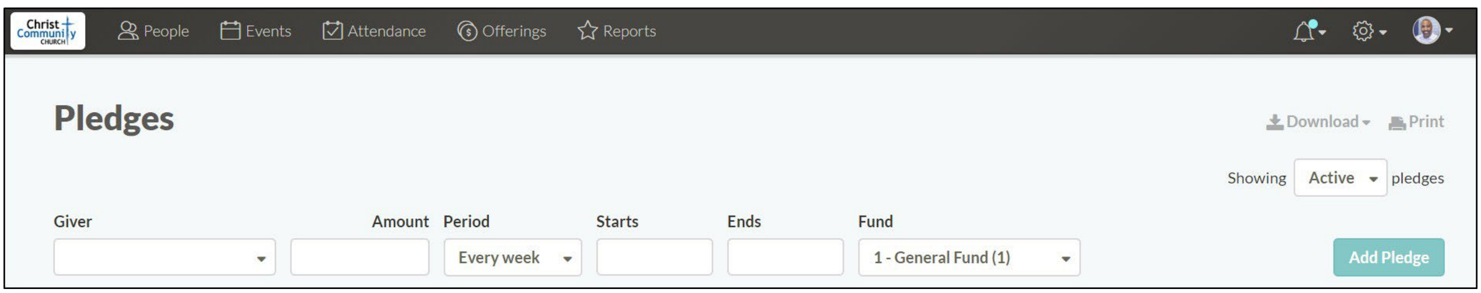
1. Click the gear icon on the right side of the Primary Navigation at the top of the screen.
2. Select "Pastoral Visits."
3. Click "Print." The view will appear in the print screen of your browser.
4. To print from this screen, click CTRL+P or"File" and "Print."

Pledges

Navigating the Pledges View

Efficiently navigating the Pledges view is critical for filtering and sorting your information to match your desired criteria.

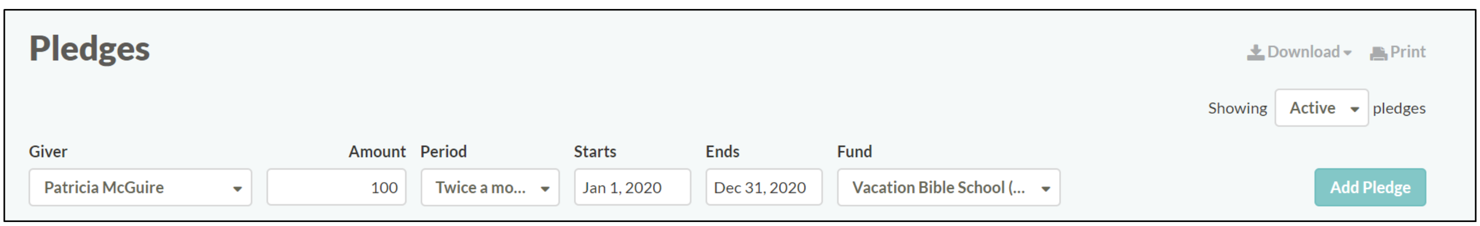
- Click the gear icon on the right of the Primary Navigation at the top of the screen.
- Select "Pledges."
- In the Pledges section, you have the option to show All pledges or only Active pledges. Select these options using the drop-down box on the right side of the screen.
- Pledges can be filtered by giver or fund simply by clicking on Name/Envelope or Fund. To remove a filter, click on the small "x"on the name underneath the heading.



Adding Pledges

People often plan their giving to churches through pledges. The Pledges feature allows you to enter and keep track of different pledges as people give over longer periods of time.

1. Click the gear icon on the right of the Primary Navigation at the top of the screen.
2. Select "Pledges."
3. Enter the name of the person whose pledge you are entering.
4. Enter the amount pledged.
5. Select how often the amount will be given by using the options in the Period drop-down box.
6. Select the start and end date.
7. Choose the fund the pledge money will go toward.
8. Click the "Add Pledge" button on the right side of the page.

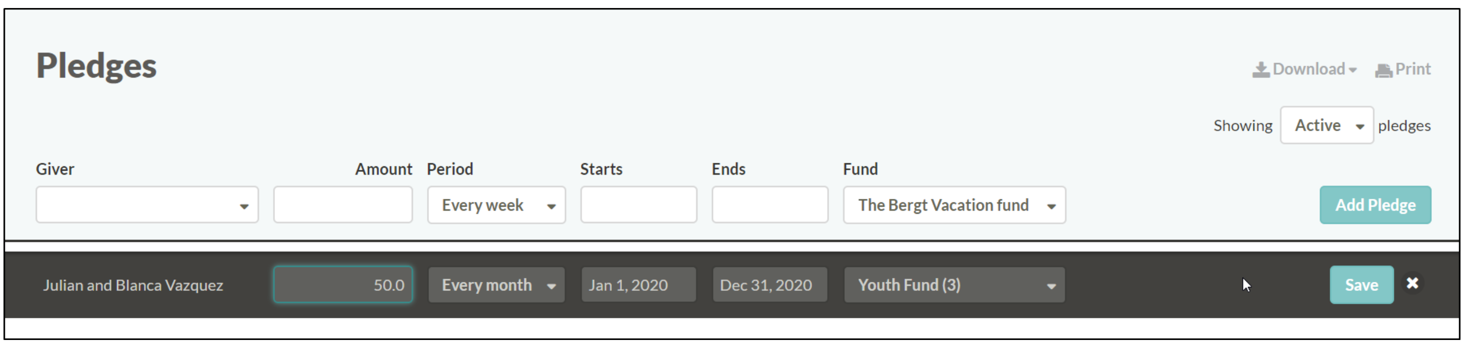


Editing Pledges

Sometimes pledge amounts, dates,or funds need to be adjusted.

Church360° Members allows you to easily edit previously created pledges.

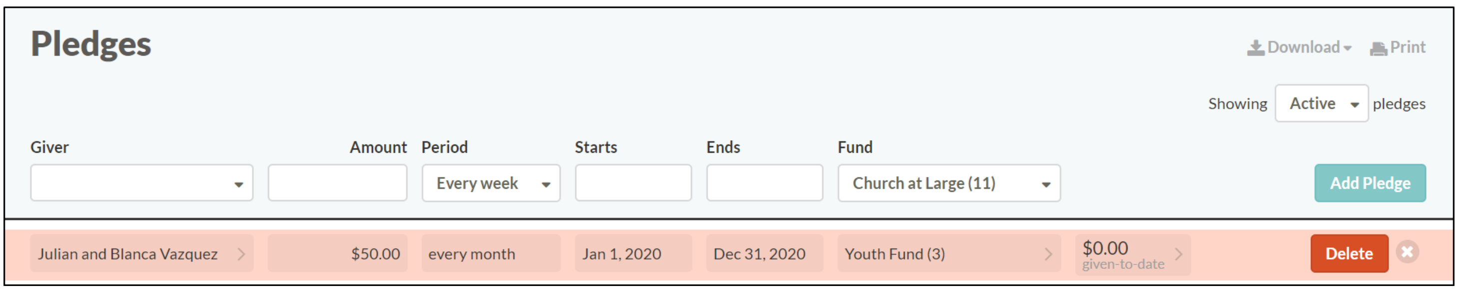
1. Click the gear icon on the right of the Primary Navigation at the top of the screen.
2. Select "Pledges."
3. Click on the pledge amount to enable editing in all fields.
4. Edit the amount, period, start and end dates, or fund.
5. Click the "Save" button.



Deleting Pledges

Pledges can be deleted if a member is no longer giving, has transferred to another church, or has passed away.

1. Click the gear icon on the right of the Primary Navigation at the top of the page.
2. Select "Pledges."
3. Click on the gray minus sign down the line from the pledge.
4. Click the "Delete" button.



Exporting Pledges List to CSV or Excel

Exporting your Pledges list to CSV or Excel can be helpful for allowing you to share a hard or electronic copy of your Pledges information with others.

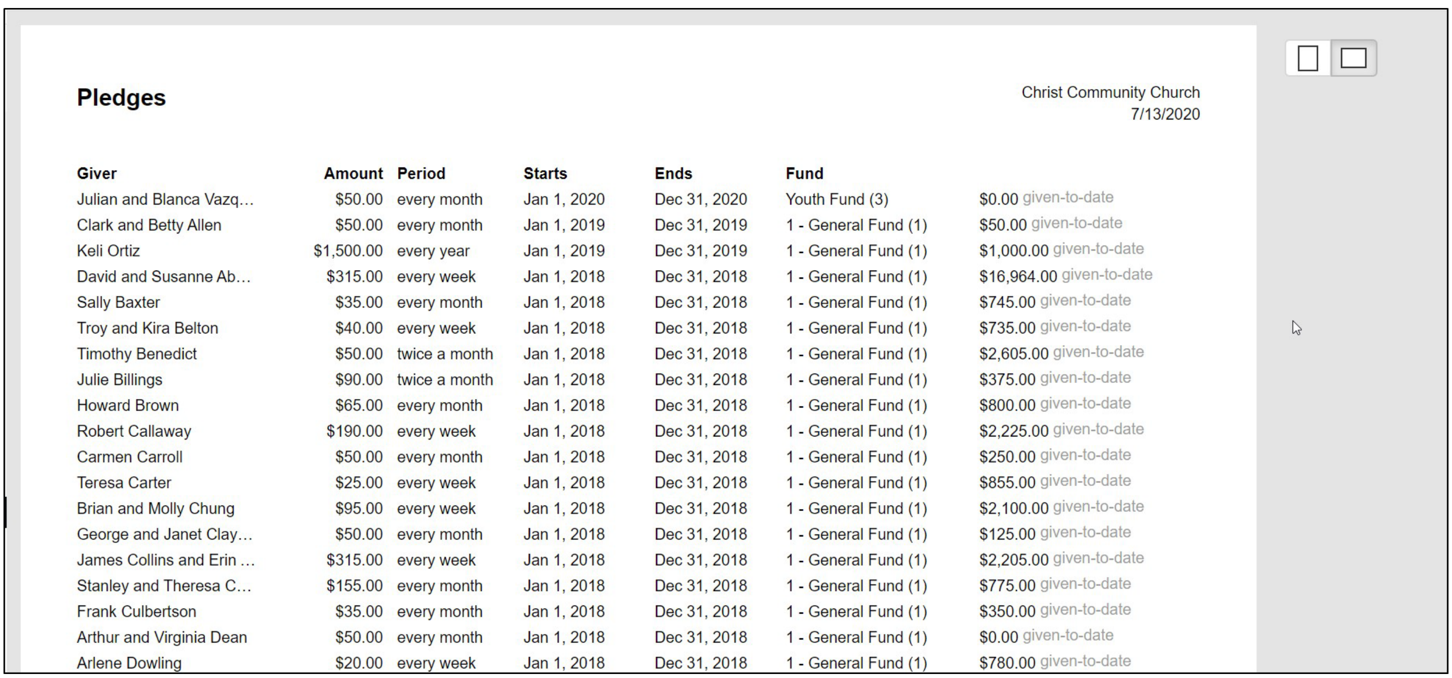
1. Click the gear icon on the right of the Primary Navigation at the top of the screen.
2. Select "Pledges."
3. From within the Pledges view, click the"Download" option and then select your desired file type (CSV or Excel). Your list will automatically generate and download.
4. Click on the file name to open your Pledges list in CSV or Excel format.

Printing Pledges List

Printing your Pledges list can be helpful for allowing you to share a hard copy of your Pledges information with others.

1. Click the gear icon on the right side of the Primary Navigation at the top of the screen.
2. Select "Pledges."
3. Click "Print." The view will appear in the print screen of your browser.
4. To print from this screen, click CTRL+P or "File" and "Print."

Note: In the top-right corner of the print window,there is a button to switch between portrait and landscape printing.



Pledges

Christ Community Church
7/13/2020

Giver	Amount	Period	Starts	Ends	Fund	
Julian and Blanca Vazq…	$50.00	every month	Jan 1, 2020	Dec 31, 2020	Youth Fund (3)	$0.00 given-to-date
Clark and Betty Allen	$50.00	every month	Jan 1, 2019	Dec 31, 2019	1 - General Fund (1)	$50.00 given-to-date
Keli Ortiz	$1,500.00	every year	Jan 1, 2019	Dec 31, 2019	1 - General Fund (1)	$1,000.00 given-to-date
David and Susanne Ab…	$315.00	every week	Jan 1, 2018	Dec 31, 2018	1 - General Fund (1)	$16,964.00 given-to-date
Sally Baxter	$35.00	every month	Jan 1, 2018	Dec 31, 2018	1 - General Fund (1)	$745.00 given-to-date
Troy and Kira Belton	$40.00	every week	Jan 1, 2018	Dec 31, 2018	1 - General Fund (1)	$735.00 given-to-date
Timothy Benedict	$50.00	twice a month	Jan 1, 2018	Dec 31, 2018	1 - General Fund (1)	$2,605.00 given-to-date
Julie Billings	$90.00	twice a month	Jan 1, 2018	Dec 31, 2018	1 - General Fund (1)	$375.00 given-to-date
Howard Brown	$65.00	every month	Jan 1, 2018	Dec 31, 2018	1 - General Fund (1)	$800.00 given-to-date
Robert Callaway	$190.00	every week	Jan 1, 2018	Dec 31, 2018	1 - General Fund (1)	$2,225.00 given-to-date
Carmen Carroll	$50.00	every month	Jan 1, 2018	Dec 31, 2018	1 - General Fund (1)	$250.00 given-to-date
Teresa Carter	$25.00	every week	Jan 1, 2018	Dec 31, 2018	1 - General Fund (1)	$855.00 given-to-date
Brian and Molly Chung	$95.00	every week	Jan 1, 2018	Dec 31, 2018	1 - General Fund (1)	$2,100.00 given-to-date
George and Janet Clay…	$50.00	every month	Jan 1, 2018	Dec 31, 2018	1 - General Fund (1)	$125.00 given-to-date
James Collins and Erin …	$315.00	every week	Jan 1, 2018	Dec 31, 2018	1 - General Fund (1)	$2,205.00 given-to-date
Stanley and Theresa C…	$155.00	every month	Jan 1, 2018	Dec 31, 2018	1 - General Fund (1)	$775.00 given-to-date
Frank Culbertson	$35.00	every month	Jan 1, 2018	Dec 31, 2018	1 - General Fund (1)	$350.00 given-to-date
Arthur and Virginia Dean	$50.00	every month	Jan 1, 2018	Dec 31, 2018	1 - General Fund (1)	$0.00 given-to-date
Arlene Dowling	$20.00	every week	Jan 1, 2018	Dec 31, 2018	1 - General Fund (1)	$780.00 given-to-date

Smart Groups

Adding New Smart Groups from the People View

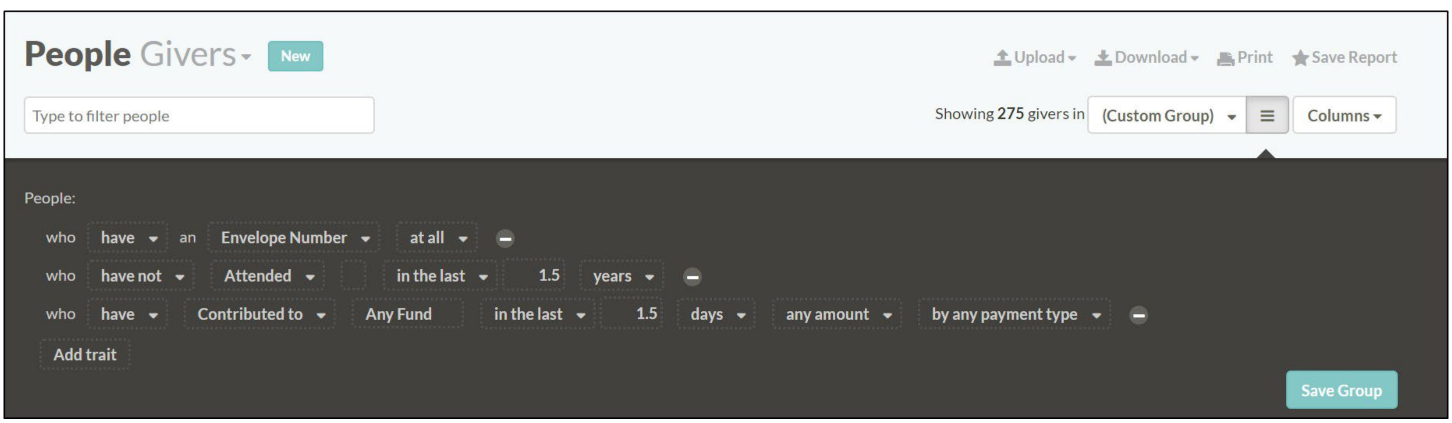
The Smart Groups feature can be created on the People view or in your settings.

Smart Groups organizes and manages information about your people for reports and for your own use.

Adding Smart Groups from the People view allows you to efficiently segment your members and see results instantaneously.

1. Within the People view, expand the Smart Groups drawer by clicking the icon with three horizontal lines (hamburger symbol).
2. Create the parameters for your group by adding traits. Smart Groups can have as many or as few traits as you want.
3. Click the "Save" button when you have completed adding traits.
4. If you are adding a new Smart Group, type the name of the new group in the text box and click "Save."

Note: If you attempt to name your Smart Group after a built-in Smart Group, Church360° Members will prompt you to select a different name for your custom Smart Group.



Adding New Smart Groups in the Smart Groups Page

Adding Smart Groups from the Smart Groups page allows you to efficiently add and manage multiple Smart Groups at one time.

1. Click on the gear icon in the top menu to open your settings.
2. Click "Smart Groups."
3. Type the name of the Smart Group into the blank text box.
4. Create the parameters for your group by adding traits. Smart Groups can have as many or as few traits as you want.
5. Click "Add Group" to create your new Smart Group.

Adding and Understanding Smart Groups Criteria and Traits

Each Smart Group is created with certain criteria to define it. These criteria allow you to organize the information of the people in your church into different groups.

Remember, Smart Groups are dynamic; they automatically add or remove members that meet or do not meet the criteria of the group.

1. When you are entering the criteria on the Smart Groups page or People view, click on the icon with three horizontal lines(hamburger symbol) to expand the edit drawer.
2. To add a criterion, click "Add trait" and specify the details of the trait you wish to add.
3. Click the "Save" button once your criteria is set.

A list of viable Smart Groups Traits are as follows:

Added: filters people by the date they were added to your Church360° Members account

Address: filters people by their active, permanent, or away addresses

Age: filters people by age

Age at: filters people by their age at a certain point in time

Attended: filters people by attendance for a date or date range

Baptized: filters people by their Baptism status and/or date

Birthday: filters people by a date or date range of their birthday

Children: filters people who may have children in a certain Smart Group

Communed: filters people who have taken Communion on a certain date

Confirmed: filters people by their confirmation status or date of confirmation

Contributed to: filters people by fund, date, and/or amount of contribution

Died: filters deceased people for a given date or date range

Divorced: filters people by divorce status or date of divorce

Email Address: filters people by whether their email address is deliverable or undeliverable

Envelope Number: Filter people by their envelope number for a given date range

Ethnic Group: filters people by ethnicity

Female: filters by people who are or are not marked as female

First Name: filters people by characters in their first name

Last Name: filters people by characters in their last name

Living: filters people who are or are not living

Male: filters by people who are or are not marked as male

Married: filters by people who are or are not marked as married

Members: filters people by their status of membership for a given date range

Modified: filters people by the date their record was modified

Nonmembers: filters people by nonmember status for a given date range

Parents: filters people who may have parents in a certain Smart Group

Phone Number: filters people by their phone number, listed or unlisted

Pledged to: filters people by the fund(s) and date range of their pledges

Received: filters people by the method and date of their reception into the congregation

Removed: filters people by the method and date of their removal from the congregation

Smart Group: finds people who are or are not in a given Smart Group

Spouse: filters people by their spouse's membership in a given Smart Group

Sunday School Grade: filters people by their Sunday School grade

Tags: filters people by the Tags assigned them

Wedding Date: filters people by their wedding date or date range

Widow(er)s: filters people who are currently marked as a Widow or Widower

Widowed: filters people by the date they were widowed

Editing Smart Groups Criteria

On the Smart Groups page, you can edit current Smart Groups.

This feature allows you to fix a typo in a Smart Group or change the assigned color for a Smart Group.

1. Click on the gear icon in the top menu and select "Smart Groups."
2. Click on the name of the group to expand the edit box.
3. Edit the necessary information.
4. To completely remove a criteria set, click on the gray minus sign next to the line of criteria you wish to remove.
5. Click the "Save" button.

Deleting Smart Groups

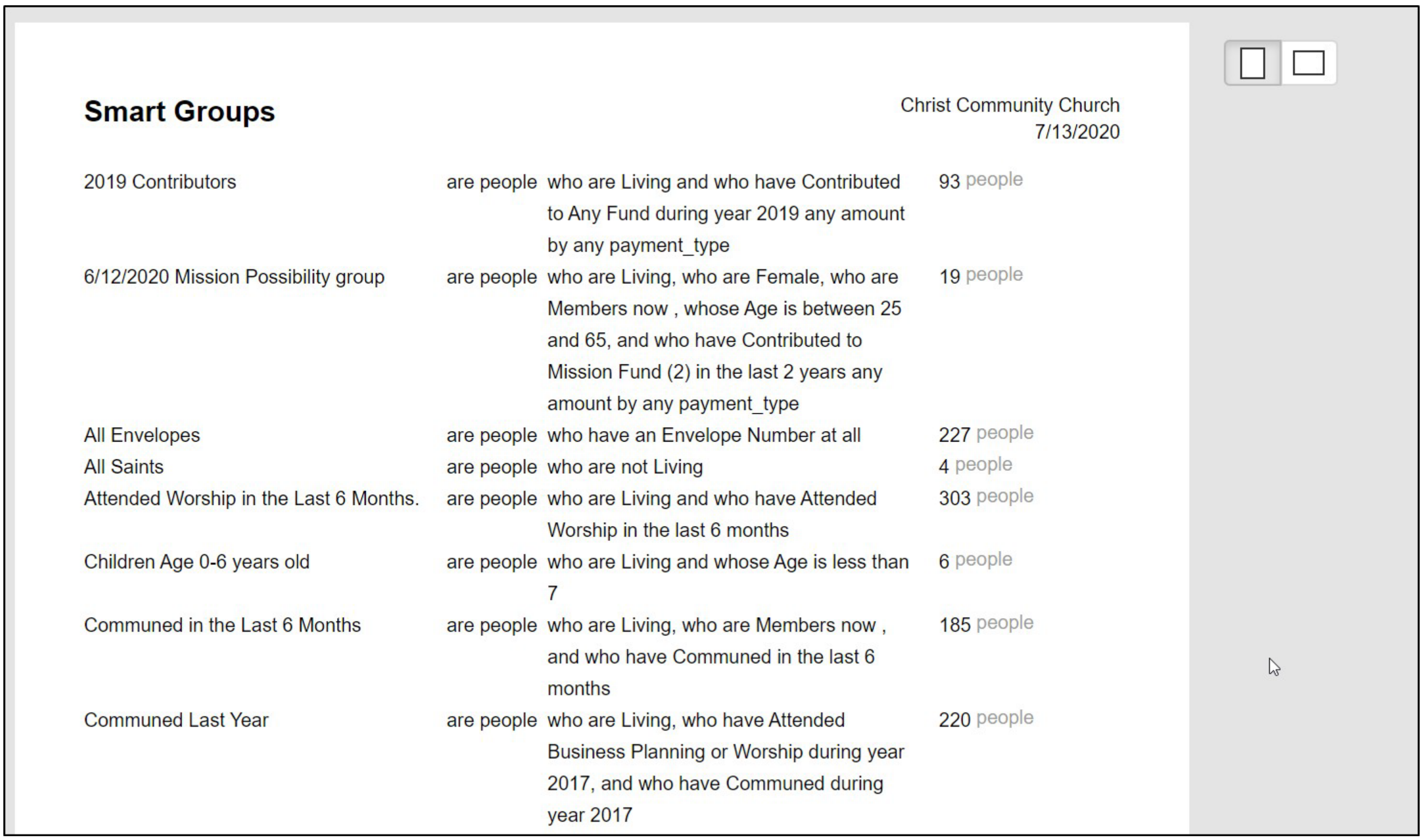
If a Smart Group is no longer in use,you may wish to delete it from your list of available Smart Groups.

1. Click the gear icon on the right of the Primary Navigation at the top of the page.
2. Select "Smart Groups."
3. Click on the gray minus sign down the line from the Smart Group.
4. Click the red "Delete" button to confirm your deletion.

Printing Smart Groups List

Printing your Smart Groups list can be helpful for allowing you to share a hard copy of the information with others.

1. Click on the gear icon in the top menu and select "Smart Groups."
2. Click on the "Print" icon in the top right corner. A new tab will open in your browser.
3. To print from this screen, click CTRL+P or"File" and "Print."



Smart Groups

Christ Community Church
7/13/2020

2019 Contributors	are people	who are Living and who have Contributed to Any Fund during year 2019 any amount by any payment_type	93 people
6/12/2020 Mission Possibility group	are people	who are Living, who are Female, who are Members now , whose Age is between 25 and 65, and who have Contributed to Mission Fund (2) in the last 2 years any amount by any payment_type	19 people
All Envelopes	are people	who have an Envelope Number at all	227 people
All Saints	are people	who are not Living	4 people
Attended Worship in the Last 6 Months.	are people	who are Living and who have Attended Worship in the last 6 months	303 people
Children Age 0-6 years old	are people	who are Living and whose Age is less than 7	6 people
Communed in the Last 6 Months	are people	who are Living, who are Members now , and who have Communed in the last 6 months	185 people
Communed Last Year	are people	who are Living, who have Attended Business Planning or Worship during year 2017, and who have Communed during year 2017	220 people

Sunday School Grades

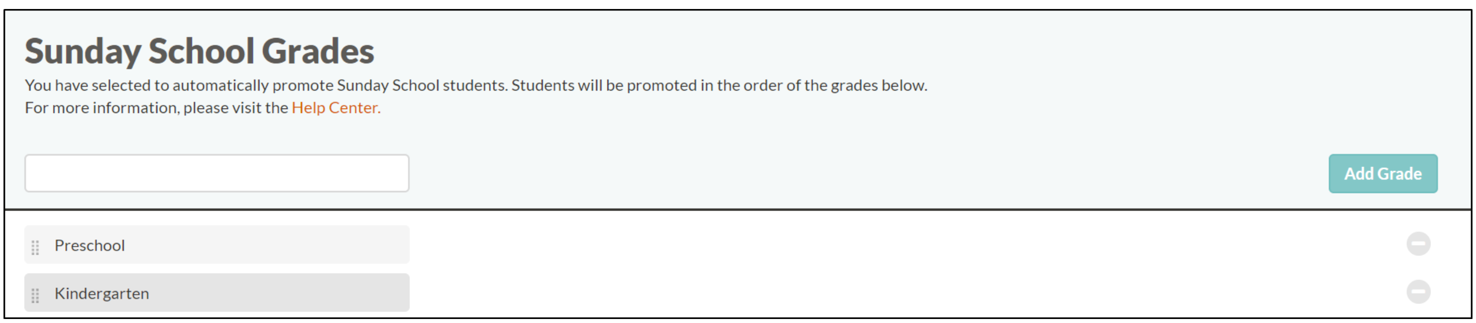
Adding Sunday School Grades

You can create labels for Sunday School grades in your church.

Sunday School grades can be customized to fit your church's needs. For example, if your Sunday School is divided up by 1st–5th grades, 6th–8th grades, and 9th–12th grades, you can adjust your grades to that rather than the traditional 1st, 2nd, 3rd, etc. grades.

1. Click on the gear icon and select "Sunday School Grades."
2. Type in the name of the Sunday School grade you want to add in the text box.
3. Click the "Add Grade" button to save your addition.
4. To move the grade to its correct position, click and hold on the grade. While still holding the mouse down, drag the grade to its correct position. Release the mouse to lock in the grade's position.

Church360° Members will automatically save your changes.

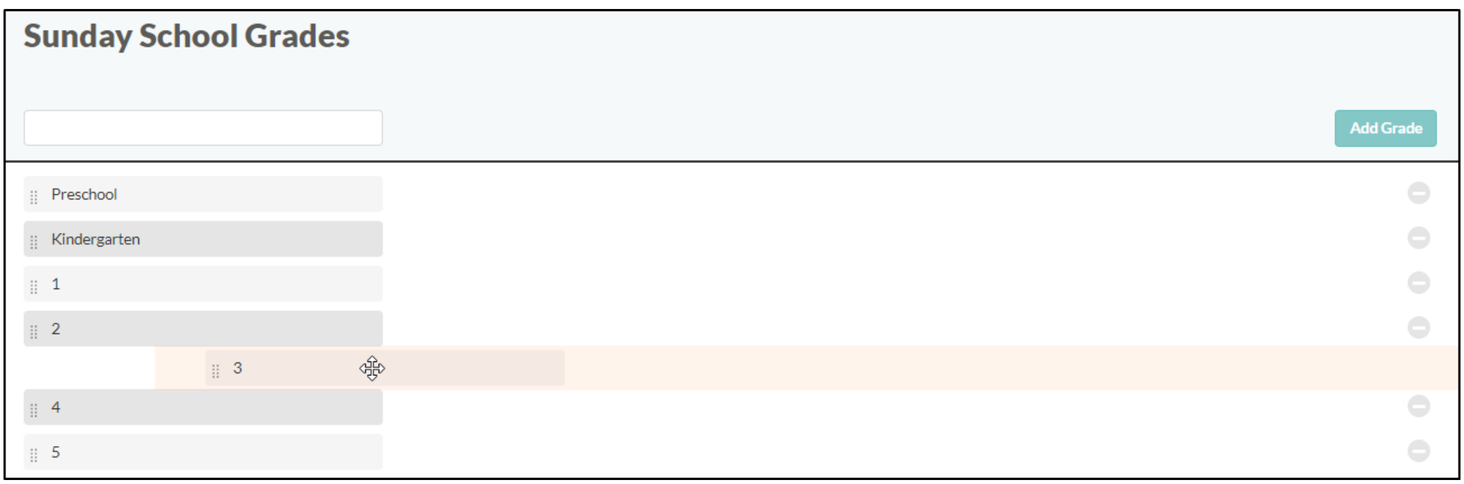


Editing Sunday School Grades

Changes can be made to the name of a Sunday School grade.

If you make changes to your Sunday School program, it may be necessary to rename your Sunday School grades or reorder them.

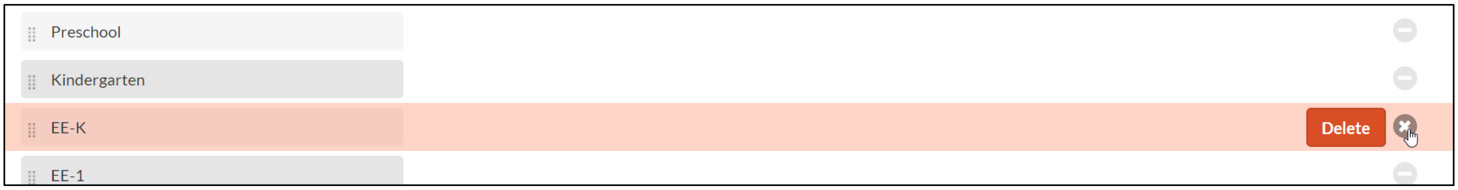
1. Click on the gear icon and select "Sunday School Grades."
2. To rename a grade, click on the name of the grade to enable editing.
3. Type in the desired changes.
4. Click the "Save" button to the right of the name.
5. To move the grade to its correct position,click and hold on the grade. While still holding the mouse down, drag the grade to its correct position. Release the mouse to lock in the grade's position. Church360° Members will automatically save your changes.



Deleting Sunday School Grades

You can delete Sunday School grades if you restructure your Sunday School system.

1. Click on the gear icon and select "Sunday School Grades."
2. Click on the minus sign to the right of the grade you wish to delete.
3. Click the "Delete" button to delete the grade.



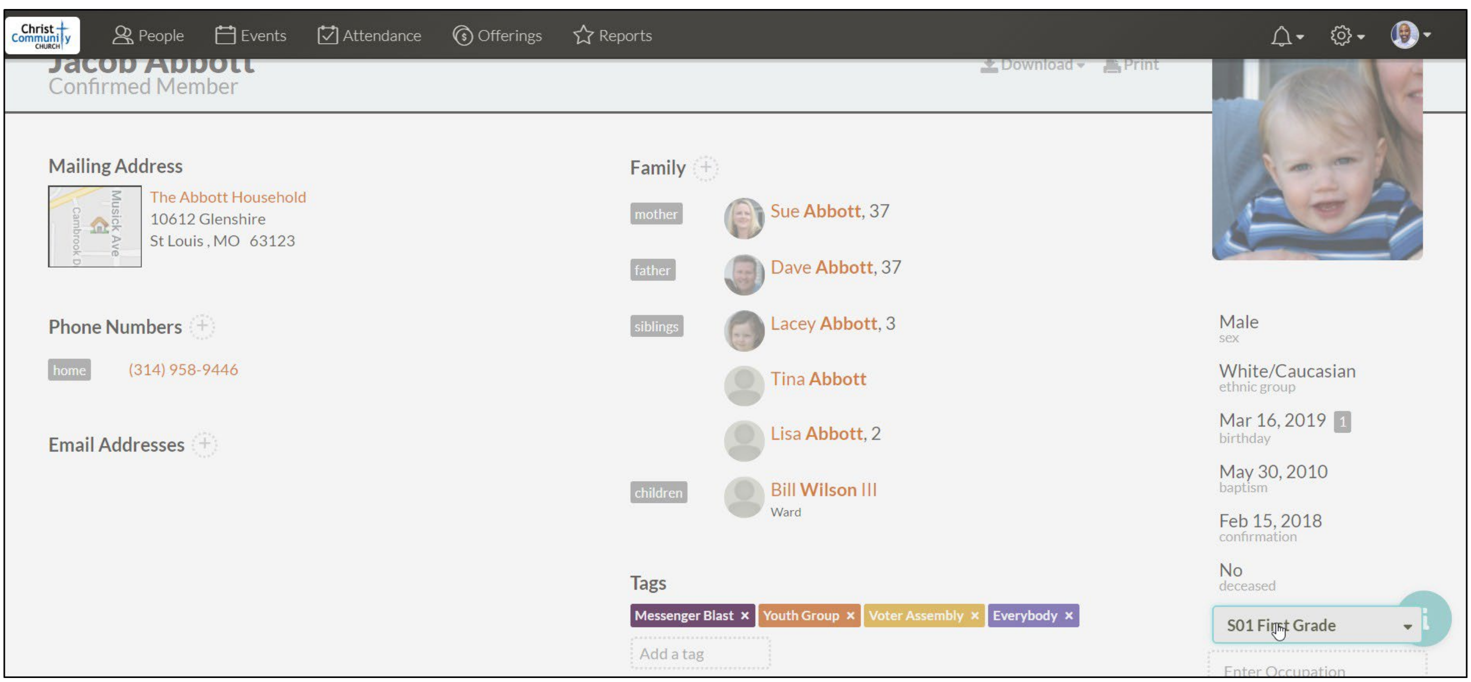
Assigning Sunday School Grades

Once you have created Sunday School grades, you can assign children in your church to them.

You can use this to keep track of children in your church so you have a record of which grade they should be going to Sunday School in.

1. In the People view, find the name of the individual whose Sunday School Grade you wish to assign.
2. Click on the person's name to open the profile.
3. On the right side of the page, click on the "grade" link. If no grade is assigned, it will say "n/a."
4. Select the Sunday School grade.
5. Click anywhere outside of edit menu to save your changes.

Note: You do not have to manually change Sunday School grades for individuals every year.

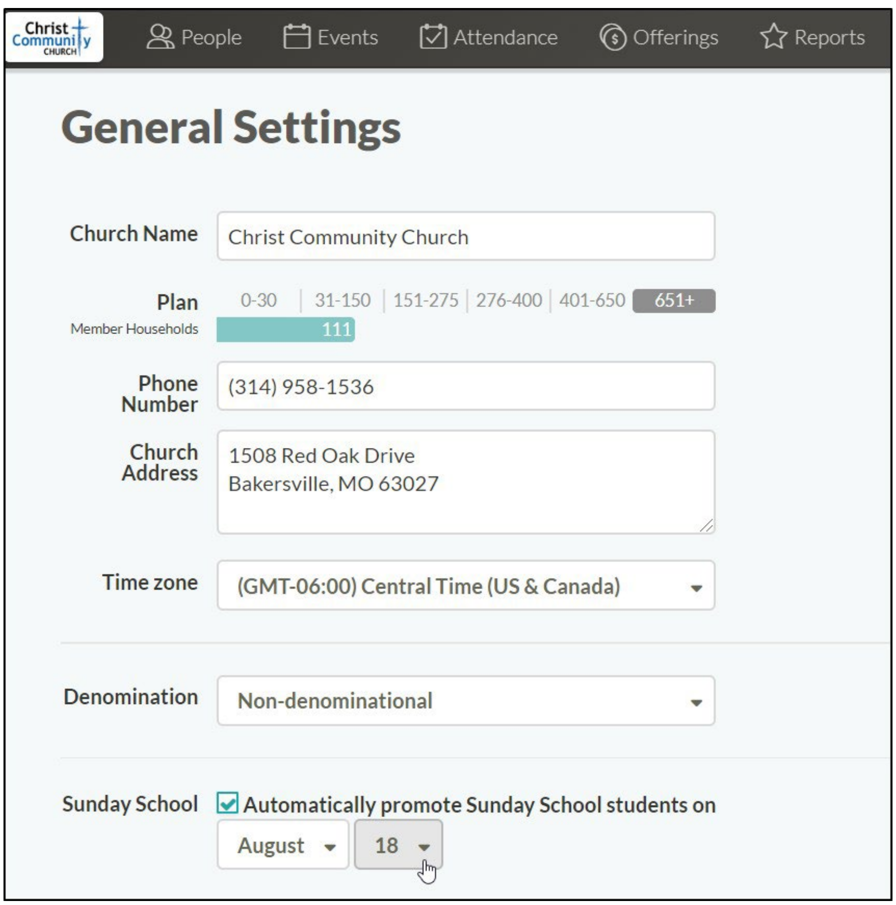


Automatically Promoting Sunday School Grades

Sunday School grades can update automatically on a certain day every year.

This feature automatically promotes everyone who is assigned to a Sunday School grade to the next grade on the date you have chosen.

1. Click on the gear icon and select "General Settings."
2. Select the box next to "Sunday School."
3. Enter in the date on which students will be promoted to the next grade.
4. Click the "Save" button.



Tags

Adding Tags from the Tags Page

To label the people on your site, you can create new Tags that fit into how you need the people in your church to be labeled.

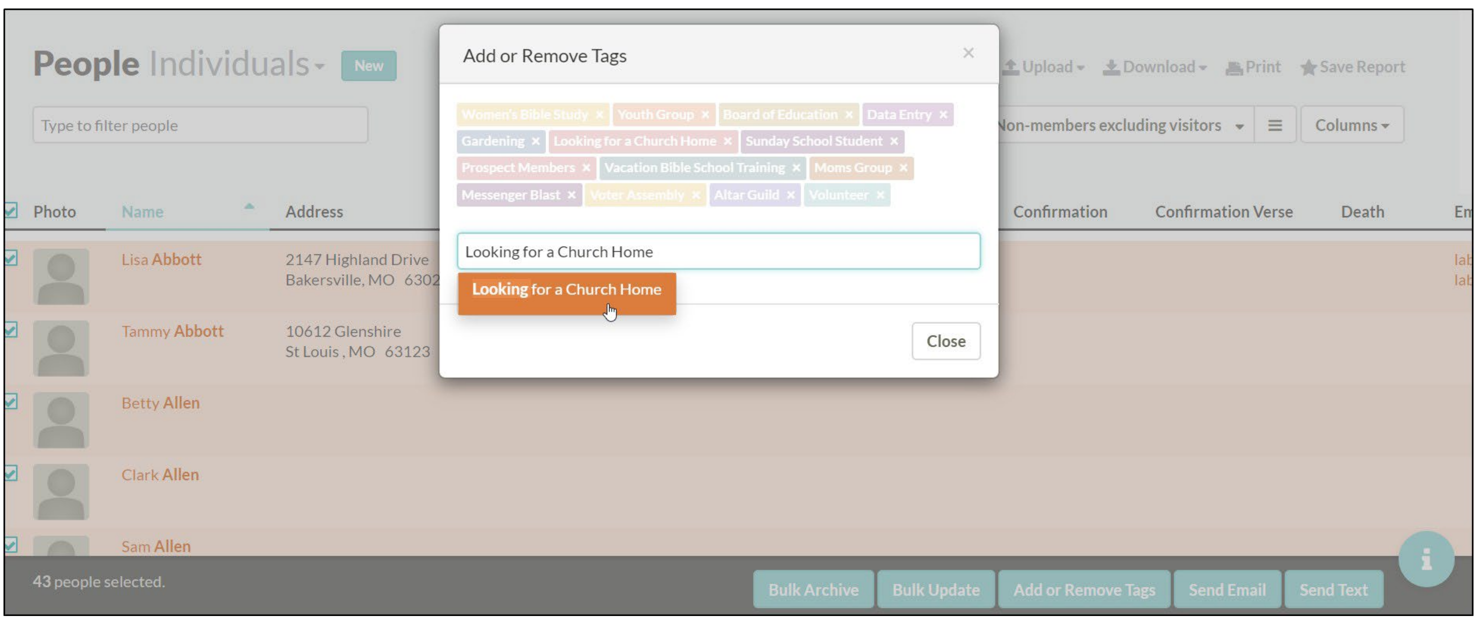
If you need Tags that are not already provided by the site, you can create new ones that will help you organize and manage your people.

1. Click the gear icon on the right side of the Primary Navigation at the top of the screen.
2. Select "Tags."
3. Type in the name of the new tag in the text box underneath the "Tags" heading.
4. Select a color for the tag by clicking on the colored circle.
5. Click the "Add Tag" button to create the new tag.

Adding or Removing Tags in Bulk

In the People view, you can quickly add and remove Tags for multiple people.Use the bulk editing feature to add or remove Tags on a large scale.

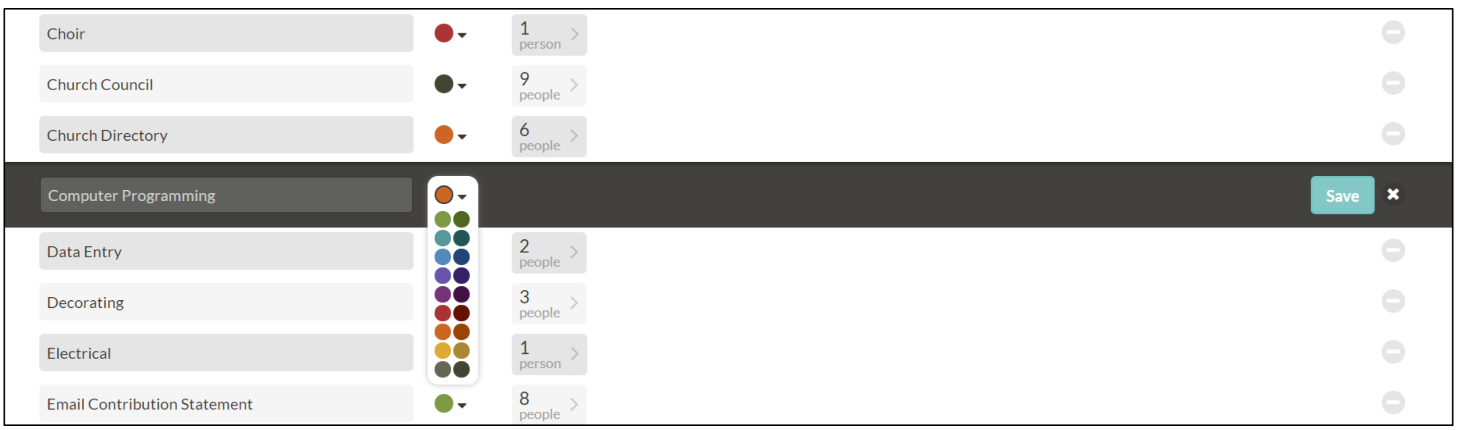
1. In the People view, select the person(s) for whom you wish to add/remove Tags by clicking on the check boxes by their name(s).
2. Click the "Add or Remove Tags" button in the ribbon at the bottom of the screen.
3. Select which Tags to add or remove from the list in the pop-up window. Church360°Members will apply your changes to all selected members.
4. Click "Close" when you are done adding or removing Tags. The next time you return to the Tags view, you will notice that the Tags list has automatically been populated with the number of people each tag applies to.
5. Click on this number label at any time to view your specific list of people with a given tag.



Editing Tags

From the Tags page, you can edit the name and color of Tags, delete Tags, and view all people assigned to specific Tags.

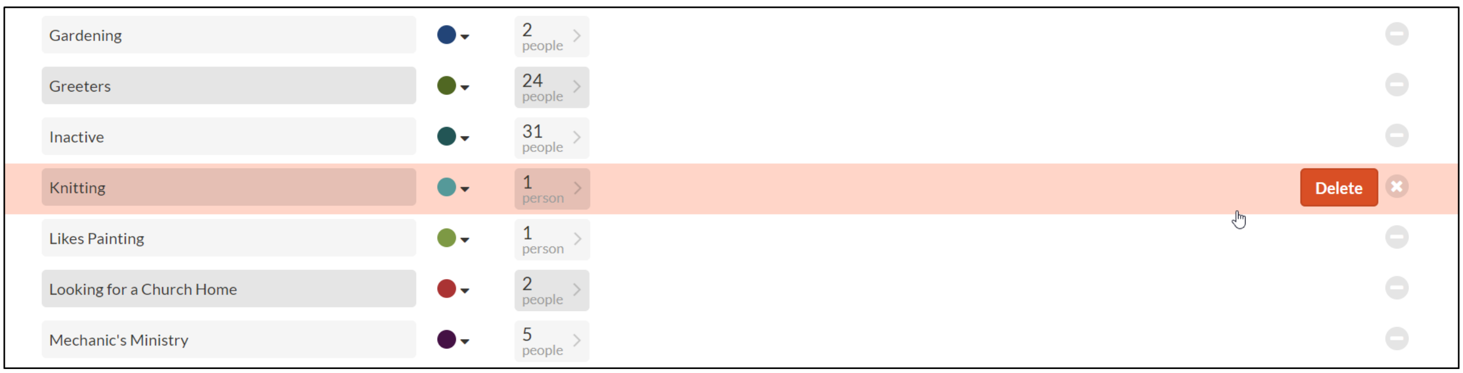
1. Click the gear icon on the right side of the Primary Navigation at the top of the screen.
2. Select "Tags."
3. To edit a Tag, click on the Tag name to enable editing.
4. Make the desired changes to the Tag name. To edit a Tag's color, click on the colored circle to expand the drop-down menu and select your desired color.
5. Click the "Save" button to save your changes.



Deleting Tags

Tags that are no longer in use may be deleted from your Tags list. Delete Tags in order to keep your Tags list accurate and organized.

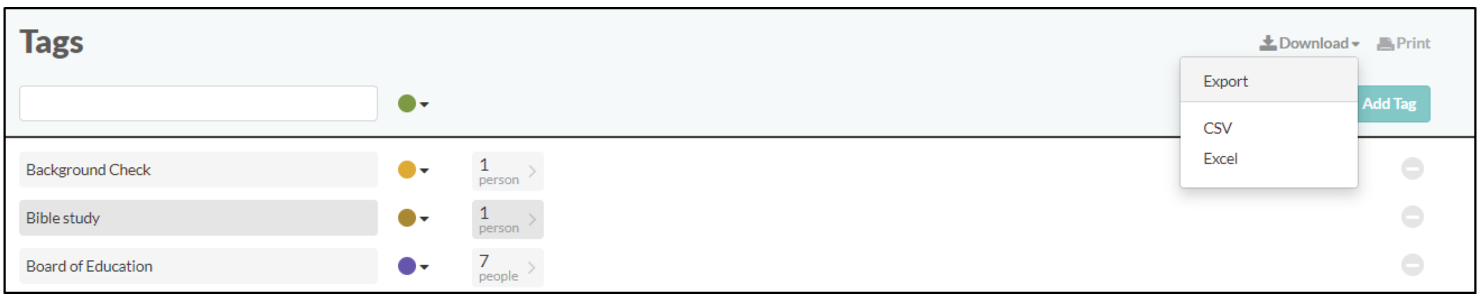
1. Click on the gear icon in the top menu to access your settings.
2. Select "Tags."
3. Click on the gray minus sign at the end of the Tag's line
4. Click "Delete."



Exporting Tags List to CSV or Excel

Exporting your Tags list can be helpful for allowing you to share a hard or electronic copy of your Tags information with others.

1. Click the gear icon on the right of the Primary Navigation at the top of the screen.
2. Select "Tags."
3. From within the Tags view, click the "Download" option and then select your desired file type (CSV or Excel). Your list will automatically generate and download.
4. Click on the file name to open your list of Tags in CSV or Excel format.



Printing Tags List

Printing your Tags list can be helpful for allowing you to share a hard copy of your Tags information with others.

1. Click on the gear icon in the top menu and select "Tags."
2. Click on the "Print" icon in the top right corner. A new tab will open in your browser.
3. To print from this screen, click CTRL+P or "File" and "Print."

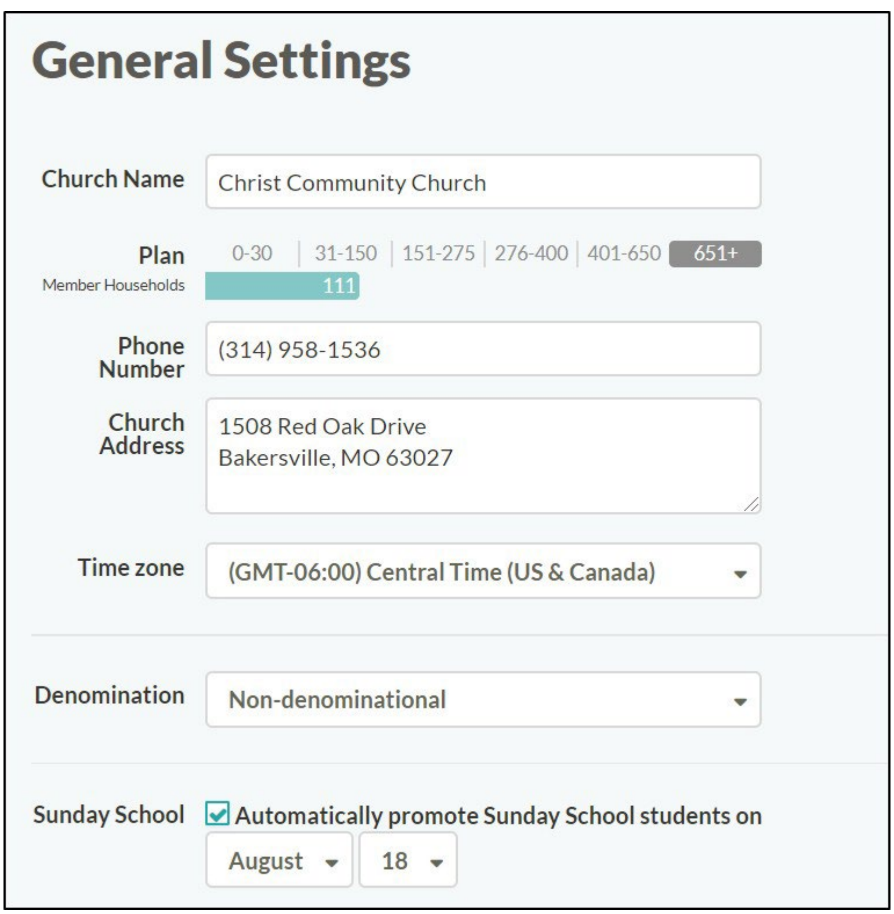
General Settings

Editing Church Information

The contact information for your church is located under General Settings in the gear icon menu.

Here you will find the name, phone number,address, denomination, and time zone of your church.

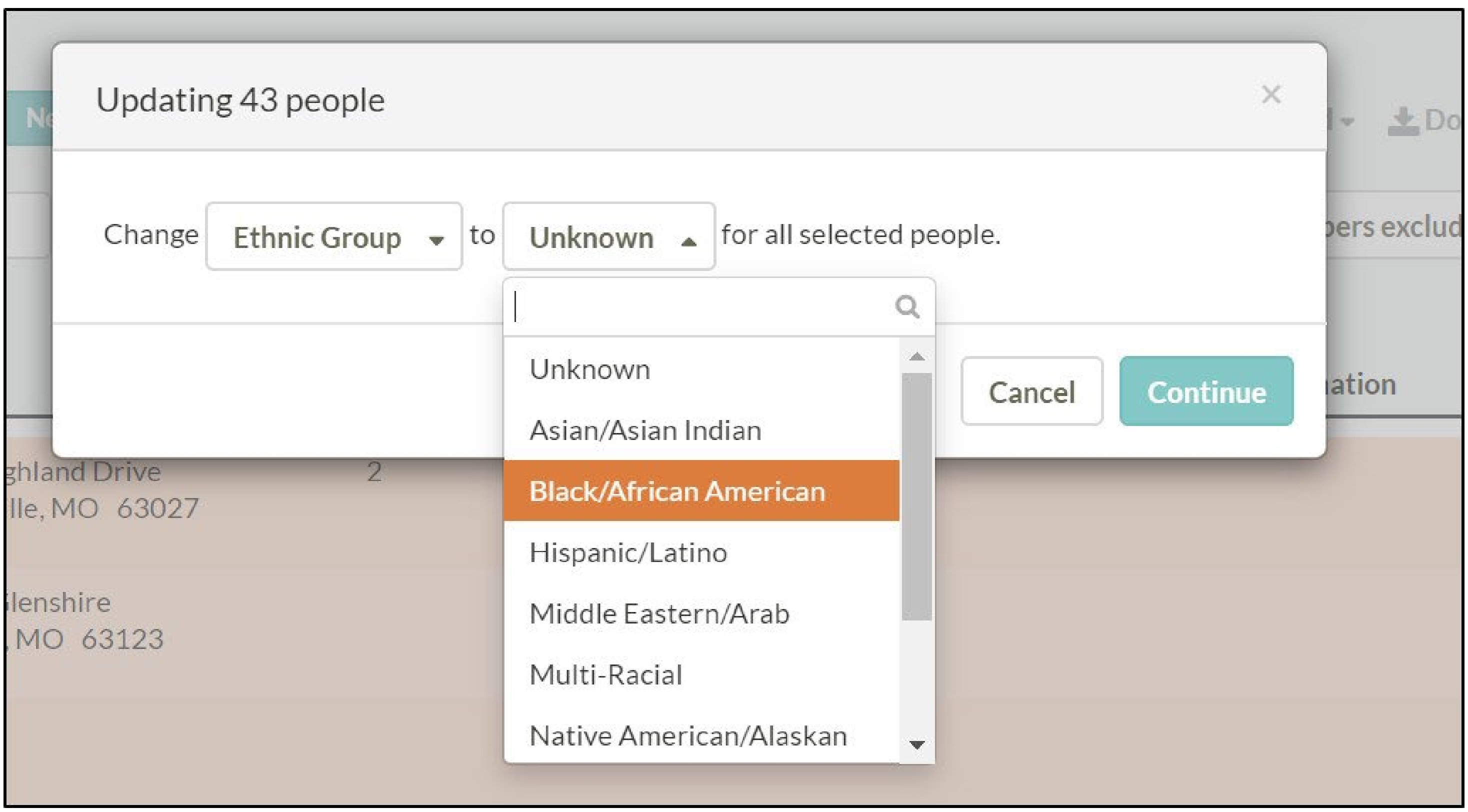
1. Click the gear icon on the Primary Navigation at the top of the screen.
2. Select "General Settings."
3. To edit any of the church's information, make the changes in the text box or drop-down menu.
4. To automatically promote Sunday School students to the next grade, check the corresponding box.
5. To change your Sunday School promotion date, select the date from the drop-down menu.
6. Select a week start day for your church. This will affect how events are created and offerings are entered.
7. Update any Custom Fields information.
8. Click "Save" to save your changes.



Bulk Updating Fields

After adding a Custom Field, you may wish to populate that field in profiles.Use the bulk update feature to update the values for multiple fields at once.

1. From the People view, select the profile of the individuals or households whose custom field you wish to update.
2. Click on the "Bulk Update" button in the bar at the bottom of the screen.
3. Select the values you wish to update.
4. Click "Continue" and type in the number to confirm your selection.
5. Click Update to finalize your bulk update. Your changes will save automatically.



Denominational Differences in Church360° Members

Church360° serves many churches of several different denominations, each requiring distinct terms in regard to membership status changes.

For that reason, CTS has reached out to various divinations for their input on how our software can best serve their congregation's needs.

As a result, Church360° Members requires specific options for the Received by and Remove by membership fields depending on the denomination set in General Settings. These settings will also be reflected in the membership gains and losses on the Annual Report.

Warning: It is important to select your correct denomination prior to entering large amounts of data onto your site. Changing your denomination remaps your received by and removed by terms. Before making a change, please reach out to our support team. Changing your denomination multiple times can remap your data into a state that's not easily reversed.

The following is a list of the terms used for each sect.

Another note worth making is that marking a member as deceased will automatically mark them as being removed by death.

Denomination	Received by/Removed by options
LCMS	Received by Baptism Received by Confirmation Received by Profession of Faith Received by Transfer from Other LCMS Received by Transfer from Other Lutheran Reinstate Removed by Excommunication Removed by Joining Non-Lutheran Removed by Moving without Transfer Removed by Release to Other Lutheran Removed by Transfer to Other LCMS Removed from Membership (Other)
WELS	Received by Baptism Received by Confirmation Received by Profession of Faith

	Received by Transfer from sister congregation Released to other Christian churches Removed by Excommunication Removed by Transfer to sister congregations Removed from Membership (Other)
ELCA	Received as Member (Other) Received by Affirmation of Faith Received by Baptism Received by Confirmation Received by Transfer Removed by Transfer Removed from Membership (Other)
United Methodist	Received as Member (Other) Received by Baptism Received by Profession of Faith Received by Transfer from Other Denomination Received from other United Methodist churches Restored by Affirmation of Faith Removed by Charge Conference action Removed by Transfer to Other Denomination Removed by transfer to other United Methodist churches Removed by Withdrawal
Presbyterian	Received as Member (Other) Received by Affirmation of Faith Received by Baptism Received by Confirmation Received by Transfer Received by Transfer from Other Denomination Received by Transfer from Same Denomination Reinstate Removed by Excommunication Removed by Transfer Removed by Transfer to Other Denomination Removed by Transfer to Same Denomination Removed from Membership (Other)
Southern Baptist	Received as Member (Other) Received by Baptism Received by Profession of Faith Received by Transfer

	Received by Transfer from Other Denomination Received by Transfer from Same Denomination Removed by Transfer Removed by Transfer to Other Denomination Removed by Transfer to Same Denomination Removed from Membership (Other)
Catholic	Received as Member (Other) Received by Affirmation of Faith Received by Baptism Received by Confirmation Received by Profession of Faith Received by Transfer Received by Transfer from Other Denomination Received by Transfer from Same Denomination Reinstate Removed by Excommunication Removed by Transfer Removed by Transfer to Other Denomination Removed by Transfer to Same Denomination Removed from Membership (Other)
Non-denominational	Received as Member (Other) Received by Affirmation of Faith Received by Baptism Received by Profession of Faith Received by Transfer Reinstate Removed by Excommunication Removed by Transfer Removed from Membership (Other)

Logins

Adding Logins

In order for other people to log in to your Church360° Members site, you will need to add them as users and assign a role to each of them.

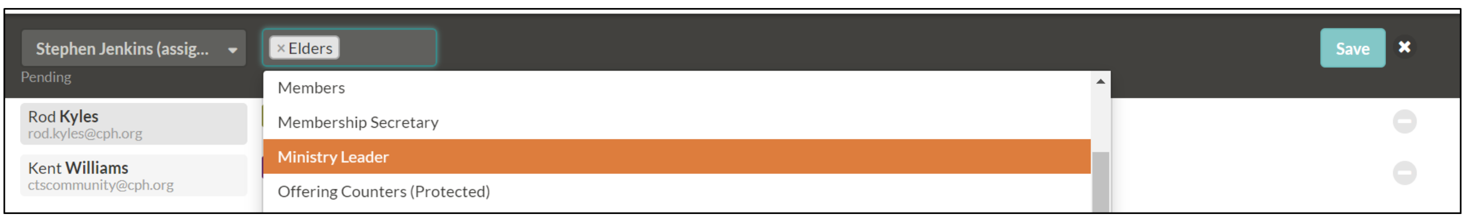
As personnel change within your church, you may need to manage the users who are able to log in to your Church360º Members site. This page allows you to manage users and their roles.

1. Click the gear icon on the right side of the Primary Navigation at the top of the screen.
2. Select "Logins."
3. Using the member drop-down menu, select the name of the individual you want to create a login for.
4. Choose a role from the drop-down menu.
5. Click "Add Login." A request will be sent to the person's recorded email address.
6. In order for a user to log in, the person must follow the instructions sent in the email.

Editing Logins

After initially creating a login, you may want to edit a person's roles or other login credentials.

1. Click the gear icon on the right side of the Primary Navigation at the top of the screen.
2. Select "Logins."
3. Click on the user's name whose role(s) you wish to edit.
4. To add an additional role to the user, enter the role name in the text box. To remove an existing role from the user, click on the gray "x" next to the role you wish to remove.
5. Click "Save" to save your changes.



Deleting Logins

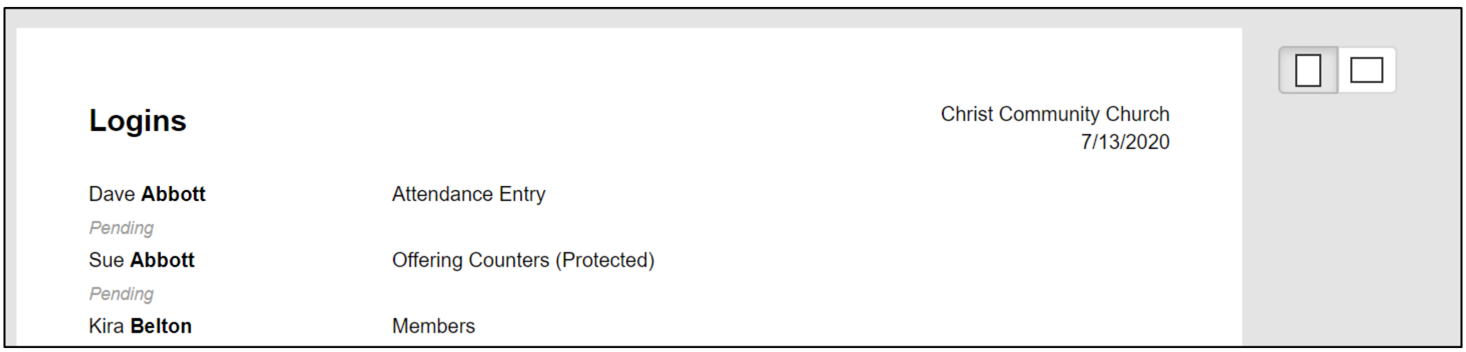
You may wish to delete logins for users who transfer their membership or no longer belong to your church.

1. Click the gear icon on the right side of the Primary Navigation at the top of the screen.
2. Select "Logins."
3. Click on the gray minus sign at the end of the Login's line.
4. Click the red "Delete" button to confirm your deletion.

Printing Logins List

In certain instances, you may wish to print an overview of all the logins for your Church360° Members account to share a hard copy with others.

1. Click the gear icon on the right side of the Primary Navigation at the top of the screen.
2. Select "Logins."
3. Click on the "Print" button. A list of logins will open in a new browser tab.
4. To save, click CTRL+S or "File" and "Save."
5. To print, click CTRL+P or "File" and "Print."



Roles

Adding Roles

You can add new roles to fit the needs of your church and the users who will be logging into Church360º Members.

There are four default roles that are built into Church360º Members:

- Administrators
- General Users
- Pastors
- Volunteers.

You may use any of these roles and create new, custom roles to help meet the needs of your church.

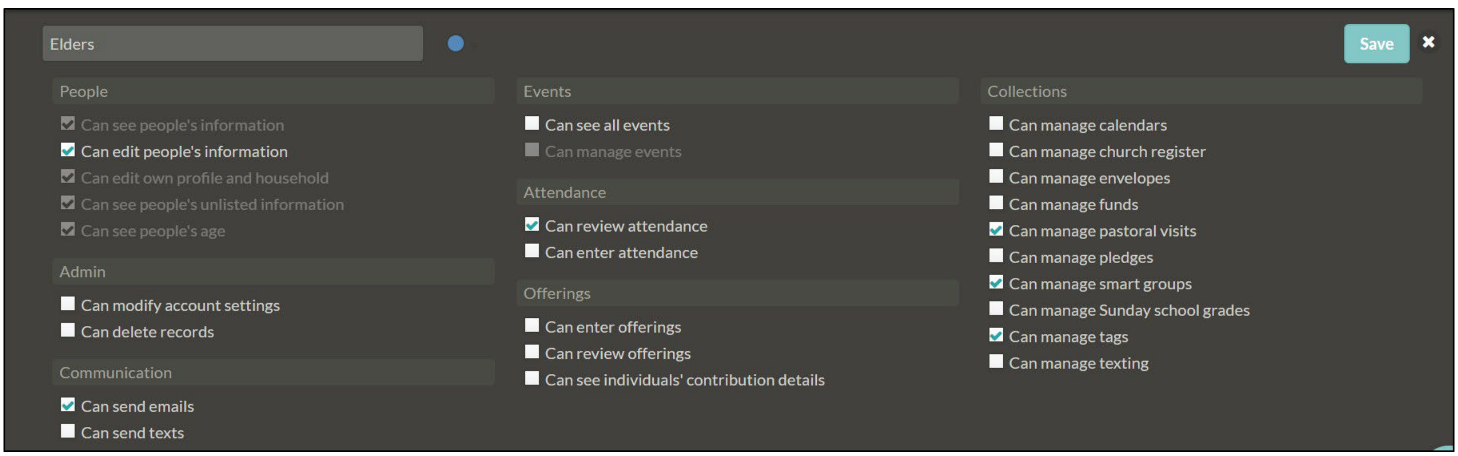
1. Click the gear icon on the right side of the Primary Navigation at the top of the screen.
2. Select "Roles."
3. Type in the name of the new role in the text box under the "Roles" heading.
4. Select the color for the role by clicking on the colored circle.
5. Click the "Add Role" button to save your addition.
6. The role's default settings will be "Can not see people" and "Can see all events." To edit these traits, click on the name of the role in the list. Select the desired traits for the role.
7. Click the "Save" button.

Editing Roles

You can edit roles to restrict or enable access to certain data within Church360° Members.

Since roles and features may change over time, you may need to edit roles after creating them.

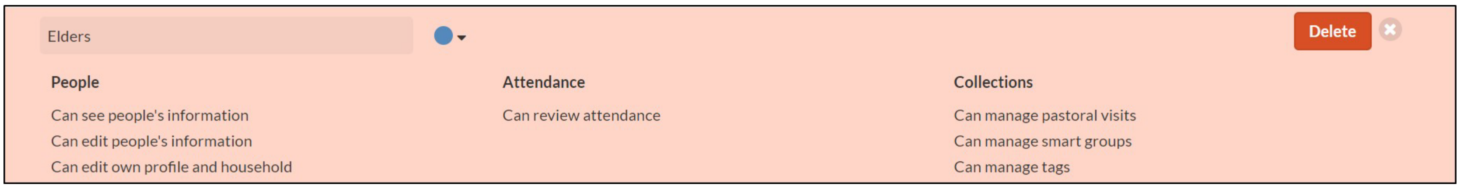
1. Click the gear icon on the right side of the Primary Navigation at the top of the screen.
2. Select "Roles."
3. Click on the name of the role in the list to enable editing.
4. Change the settings by marking the circle or checking the box next to the trait.
5. Click the "Save" button when finished.



Deleting Roles

Deleting a role will delete that permission from anyone that was assigned it.

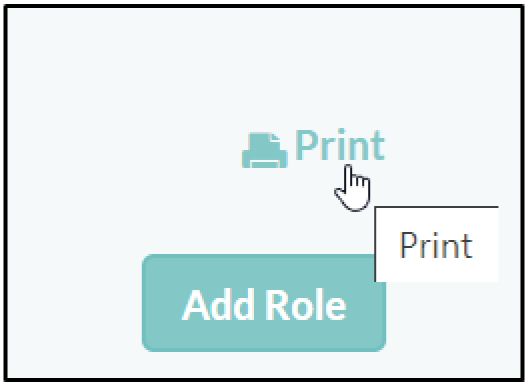
1. Click the gear icon on the right side of the Primary Navigation at the top of the screen.
2. Select "Roles."
3. Click on the minus sign to the right of the role you are deleting.
4. Click the red "Delete" button to confirm your deletion.



Printing Roles List

You may wish to print your Roles list to share a hard copy of your information with others.

1. Click on the gear icon in the top menu and select "Roles."
2. Click on the "Print" icon in the top right corner. A new tab will open in your browser.
3. To print from this screen, click CTRL+P or "File" and "Print."



Vanco Integration

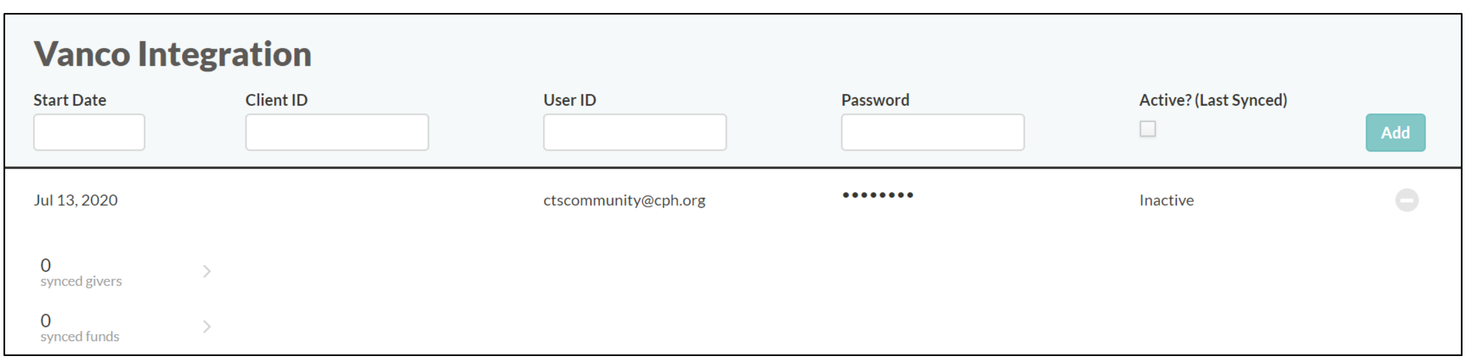
Setting Up Vanco Integration

The first time you sync your Vanco account, you will need to link your Vanco account with your Church360º Members account.

1. Click the gear icon on the right side of the Primary Navigation at the top of the screen.
2. Select "Vanco Integration."
3. If you want to pull offerings from your Vanco account, check the box.
4. Choose the date when you want to start importing electronic offerings.
5. If you have entered any electronic offerings manually, select a date that is after your last manual entry.
6. In the text box next to Client ID, type in the Client ID that Vanco assigned to you.
7. In the text box next to User ID, type in the Web Service User ID from Vanco.
8. In the Password text box, type in the password for your Vanco account.
9. Click the "Save" button at the bottom to connect Church360º Members to your Vanco Payment Solutions account.

Note: The User ID in the setup for the Vanco Integration does not refer to your Vanco website login. This refers to the Web Services (WS) User ID. The WS User ID is a special ID that you will need to contact Vanco directly in order to receive.

Please submit refunds through Vanco. A notification will then be sent to a Concordia Publishing House developer, who will edit the offering record in your Church360° Members account.

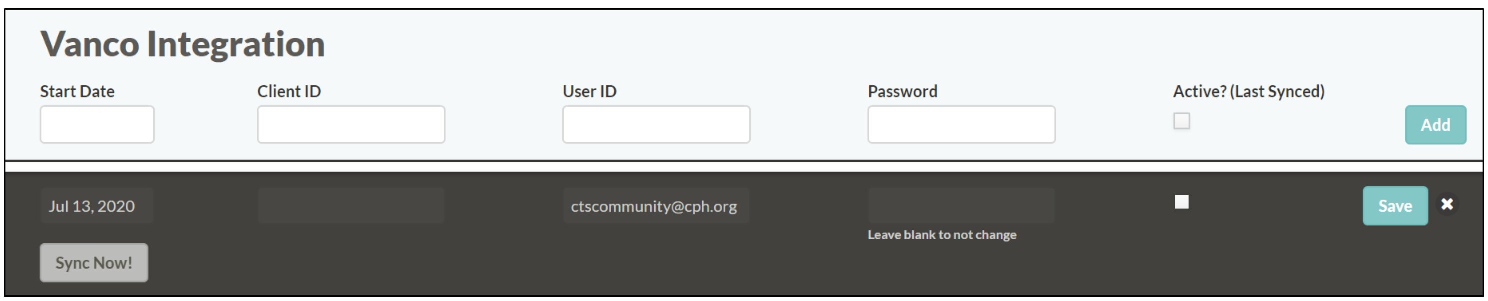


Syncing Vanco Offerings

When you have connected your Church360º Members account to your Vanco Payment Solutions account, you will need to synchronize the two accounts for offerings to be transferred into your Church360º Members site.

Once you have set up the connection between Vanco and Church360º Members, the site will automatically check for new electronic offerings every 6 hours. Alternatively, you can synchronize the sites immediately with these steps:

1. Click the gear icon on the right of the Primary Navigation at the top of the screen.
2. Select "Vanco Integration."
3. Click the "Sync Now!" button at the bottom of the screen.



Unlinking Vanco Funds

Vanco funds can be unlinked from Church360° Members funds when fund information changes or is transferred to another fund.

1. Click on the gear icon on the right side of the Primary Navigation at the top of the screen and click “Vanco Integration."
2. Select “Synced Funds.”
3. Find the Vanco fund you want to unlink from your Church360° Members fund.
4. Click “Unlink.”

Matching Unmatched Vanco Funds

When offerings are given through Vanco Payment Solutions they are connected to a specific fund in Vanco. These Vanco funds can correlate to your funds in Church360º Members.

If people want to give to a certain fund, they can do so through Vanco. If the Vanco funds are connected to Church360º Members, the offerings will automatically connect to the funds your people are giving to.

To view funds that have not been matched in Church360° Members,

1. Click the gear icon on the right side of the Primary Navigation at the top of the screen.
2. Click "Vanco Integration."
3. Select "Synced Funds." This page will show you all outstanding Vanco electronic offerings that have not been matched with a Church360° Members fund.
4. Find the Vanco fund you want to link to a Church360º Members fund.
5. Click on the drop-down menu next to the fund's name.
6. Select the corresponding Church360°Members fund from the drop-down menu.
7. Click the "Save" button to link this Vanco fund to your Church360º Members fund.
8. If there are funds from Vanco that do not correlate to funds in Church360º Members, you can choose to ignore them by clicking the "Ignore" link next to its text box.

Matching Unmatched Vanco Givers

When people have given an electronic offering through Vanco Payment Solutions, it will appear in your Church360º Members site once you have synchronized them. The first time offerings are given by an individual through Vanco, you will need to match the giver in Vanco to the proper person in your Church360º Members site.

Matching the givers from Vanco to people in Church360º Members allows you to complete the process of electronic giving. When you match the givers, their offerings are then added automatically into the offerings section of Church360º Members.

1. To view givers who have not been matched in Church360° Members, first click the gear icon on the right side of the Primary Navigation at the top of the screen
2. Click"Vanco Integration."
3. Select "Synced Givers." This page will show you all outstanding Vanco electronic givers who have not been matched with a Church360° Members person. Users'addresses will appear in this view if they are saved in the system.
4. Find the Vanco contributor you want to match.
5. Click on the drop-down menu next to the name.
6. Type in the name of the person in Church360º Members the contributor is connected to and select the member from the drop-down menu.
7. Click "Save" to match the Vanco contributor with the person in Church360º Members.

Texting

Match Phone Number Submissions

For the majority of your congregation, if your data is up-to-date and accurate, this won't be necessary, as the system will be able to match the person with their phone number in Church360 Members automatically. But, if a person responds to the opt-in email from a different phone number than you have listed for them in Church360 Members, then you'll need to match up that phone number with the appropriate person record.

1. Log in as a user with administrative privileges as part of their assigned role.
2. Click on the settings gear in the top right corner of the page and select "Texting" under the Admin section
3. Next to the section labeled "Match Phone Number Submissions" the system will show you how many phone numbers are in need of being matched up with a person. Click on this number to be taken to the matching screen.
4. The next page will show 3 columns. First, the name of the person that you sent the opt-in invitation to. Next, you'll see the phone number they opted-in under. Finally, the third column will let you select a person record from Church360 Members. Select the appropriate person
5. If a record needs to be ignored or the person you selected is the wrong person, click the gray button with a minus sign in it to either ignore or unlink the record.

Setting up Texting

Church360 Members allows for users to send text messages directly from Church360 Members to the people in your congregation. To set up text messaging in Church360 Members, you'll need to follow a few steps:

1. Log in as a user with administrative privileges as part of their assigned role
2. Click on the settings gear in the top right corner of the page and select "Texting" under the Admin section
3. Check the box next to the "Opt-in page" section where it asks if you want to "Enable the text messaging opt-in feature?"
4. Where it shows a box for "Personalize Opt-In Email", you can set up an additional message to include along with the standard opt-in email that your congregation will receive
5. At the "Send Opt-In Email" section, select the Smart Group or Tag you'd like to send the opt-in email to, and click "Send Invite"
6. A window will appear which will show each person in the selected smart group or tag. Next to each person, you'll see each of their email addresses. Make sure that you have the email address checked for each person that you want to send an invite to, then, click "Send"

At this point, the members of your congregation will receive an email, asking if they want to opt-in to texting for your church. If they accept, they'll be taken to a webpage where it will ask them to type in their phone number. After they type in their phone number, they'll get a confirmation text message, where if they reply YES, they will be opted in to text messaging with your church.

Sending Texts

Once you've set up your Texting in Church360 Members, and matched up any people in your congregation whose phone number didn't match with what you already had in Church360 Members, you're ready to send out a text message. To send text messages, follow the steps below:

1. Open the Person View
2. Check the box next to each person you'd like to send a text message to. You can select everyone in a group by clicking the check box in the column header row at the top of the person records.
3. Click "Send Text" in the gray bar at the bottom of the screen
4. This will bring up the texting window. In the bar on the left, you'll see each person you selected, and each of their phone numbers. You will only be able to check the box next to each phone number they opted in under.
5. Choose your message type. These are descriptions of what the texts may be for, and will provide you with a sample text you could use.
6. In the Enter Text Message field, type in the message you want to send. There is a 160 Character limit on text messages
7. Click Send. This will send your text message to each person you checked off in the texting window.

How to Unsubscribe from Texting

A member of your congregation may choose to unsubscribe from texts sent out from Church360 Members. If they would like to do this, they'll need to open a text message they received from Church360 Members on their phone and send "STOP" as a reply to the message. This will unsubscribe this person from Texts from Church360 Members.

Event Log

- Navigating the Event Log

Navigating the Event Log

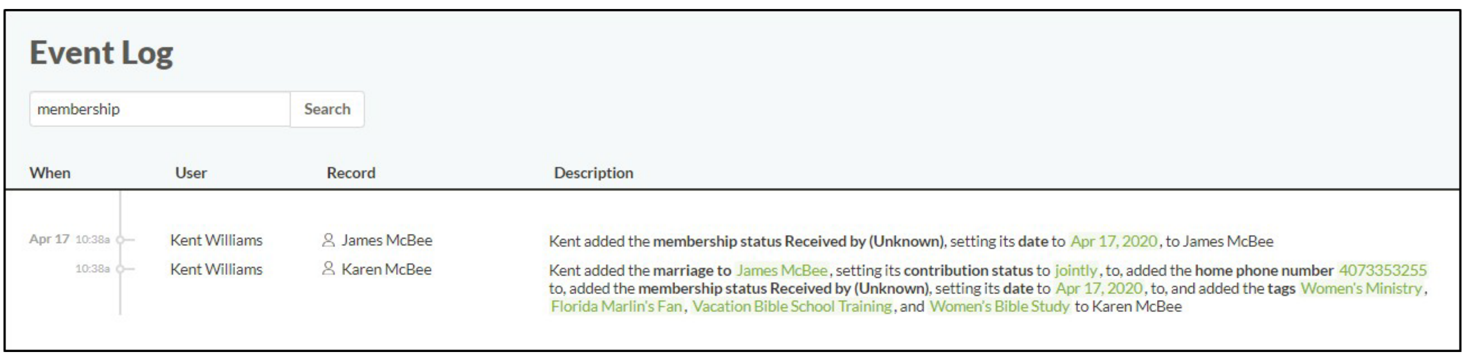
The Event Log is a built-in tool that helps you track when changes are made in your Church360° Members database.

- Access the Event Log by clicking the gear icon on the right side of the Primary Navigation at the top of the screen. Select "Event Log."

- You may search the Event Log at any time by typing in your terms and clicking "Search." The events in the log will filter to include only those results that include your search terms.

The Event Log has four main columns:

- **When** - states the date and time changes were made
- **User** - states which user made the changes
- **Record** - states which record these changes were applied to
- **Description** - gives a detailed description of the changes that were made

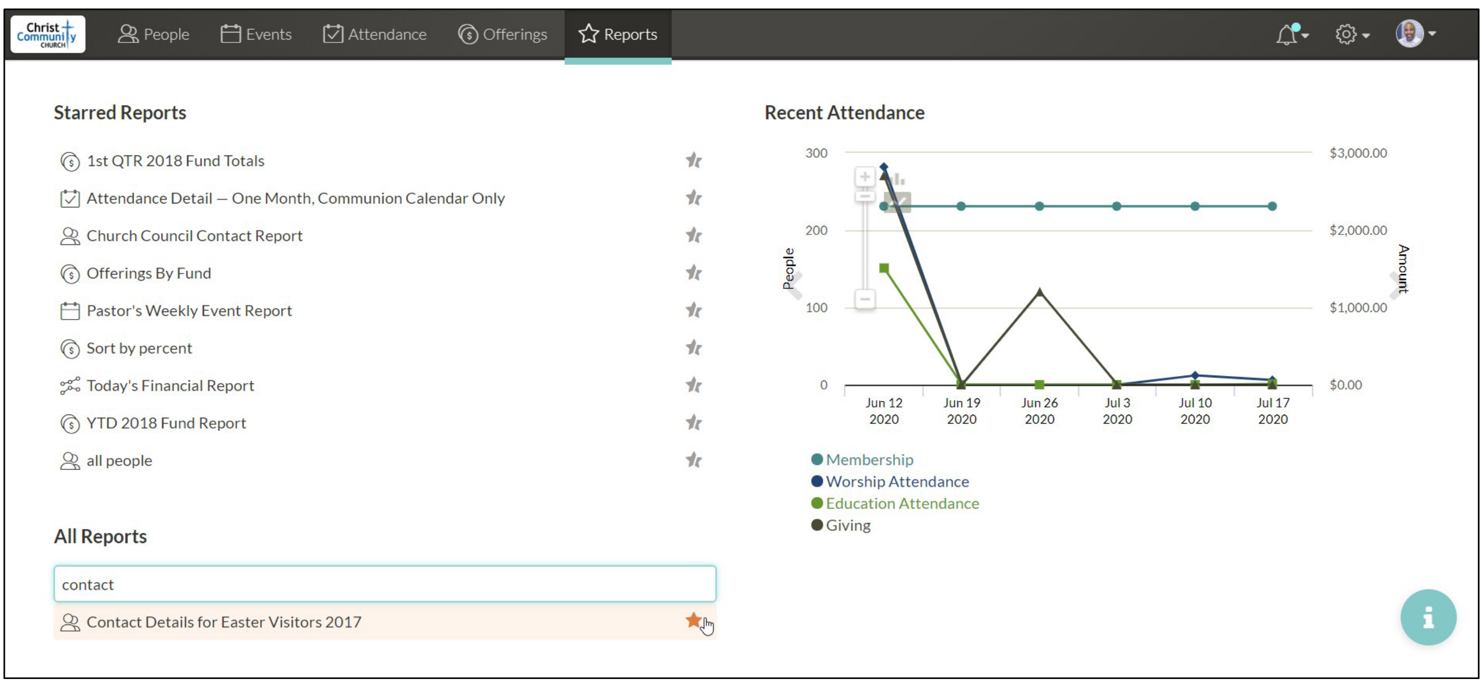


Reports

Navigating the Reports View

There are two main divisions within the Reports view: Starred Reports and All Reports. Use these divisions to help you differentiate between reports you use regularly and reports you use on special occasions.

- Starred Reports are those reports you use most frequently. To star a report, select the report from the All Reports section and click on the star icon next to the report name. The report will automatically move into the Starred Reports section. If you click on the star next to any report in the Starred Reports section, the report will be deleted automatically.
- All Reports contains the reports built into Church360° Members, as well as reports created by other users in your account. Use the filter box to search for reports by name and to easily access your desired report. You may star a report in the All Reports section if you wish for it to be easily accessed in the Starred Reports section.



Default Reports

There are eleven default reports that will automatically generate as soon as you create your Church360°Members account. These built-in reports appear under “All Reports.”

You cannot delete these built-in reports, but you may use them as abase for adding reports that more specifically meet the needs of your congregation.

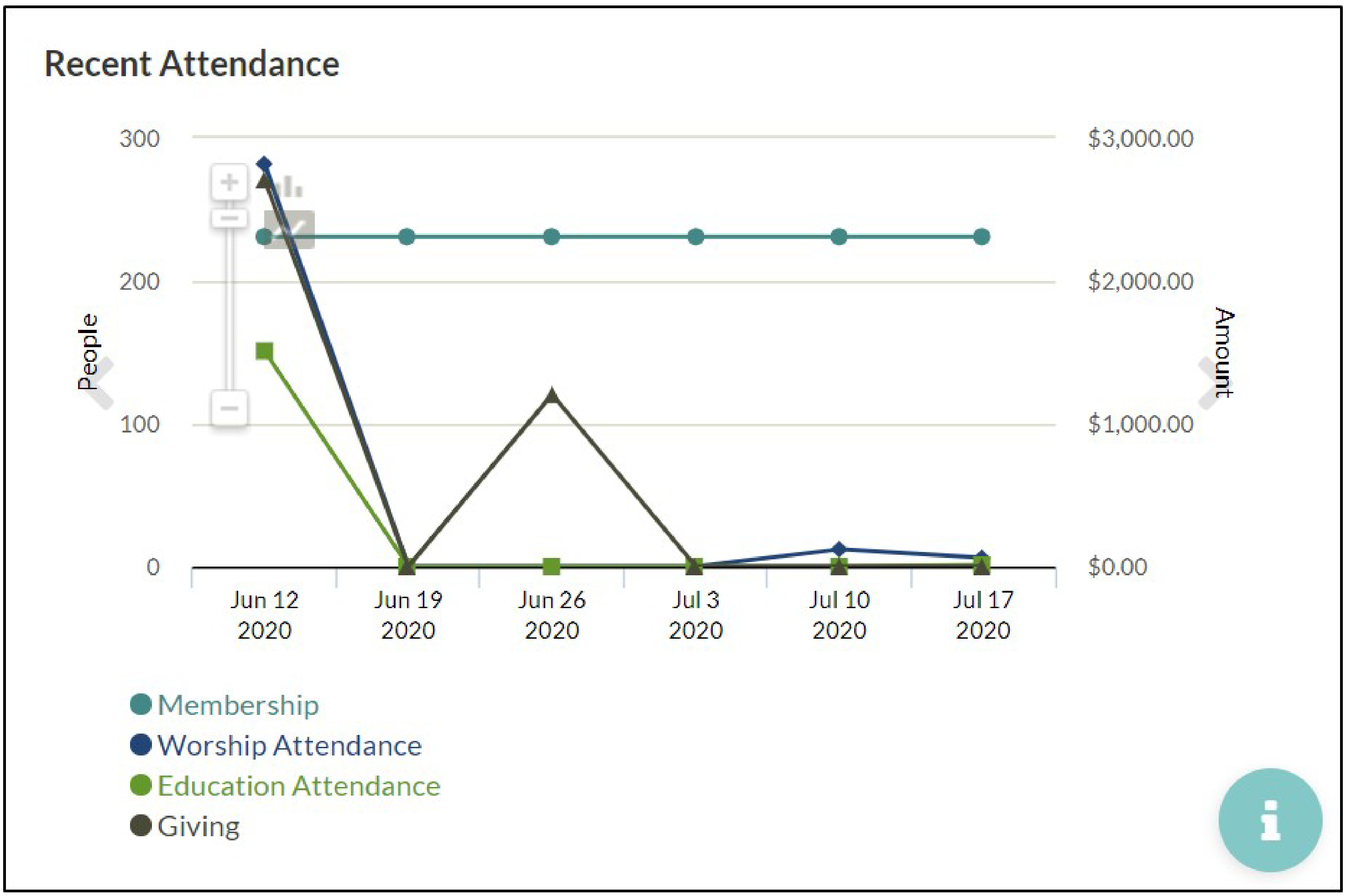
- Annual Report: generates an annual report based on your denomination’s requirements
- Attendance Detail: gives you an overview of attendance for all people in your church
- Gift Range Breakdown: compare trends in your contributors’ giving ranges over time
- Members: sends you to a view of all the people marked as members in your congregation
- Members Gained and Lost: shows the net gain and loss in your membership over time
- Membership Comparison (2-year comparison):shows a year-by-year comparison of membership over time
- Offerings by Fund: breaks down offerings by fund totals
- Pledge Progress: compares giving and pledges by giving unit
- Pledges, Compared to Offerings: gives an overall snapshot of pledges and offerings over aspecific time period
- Pledges, Compared to Previous Year: compares this year and last year’s pledges
- Visitors Follow-Up: provides a list of visitors to follow up with
- Worship Attendance and Offerings, Compared to Previous Year: compares this year’s worship and attendance to last year’s worship and attendance

Recent Attendance Graph

The Recent Attendance Graph found on the right side of the Reports view displays a graphical representation of your membership, worship attendance, education attendance, and giving.

As new members are added,attendance is recorded, and offerings are entered, this graph will automatically adjust to reflect these updates.

1. The graph can be displayed as either a bar graph or a line graph.
2. Click the respective icons on the graph to update your view. You can zoom in or zoom out to view a different time frame by clicking the plus (+) or minus (–) signs or sliding the bar on the line to more finely adjust your view. To view different date ranges, use the arrow paddles on either side of the graph. The left arrow will show older dates, and the right arrow will expose newer dates.



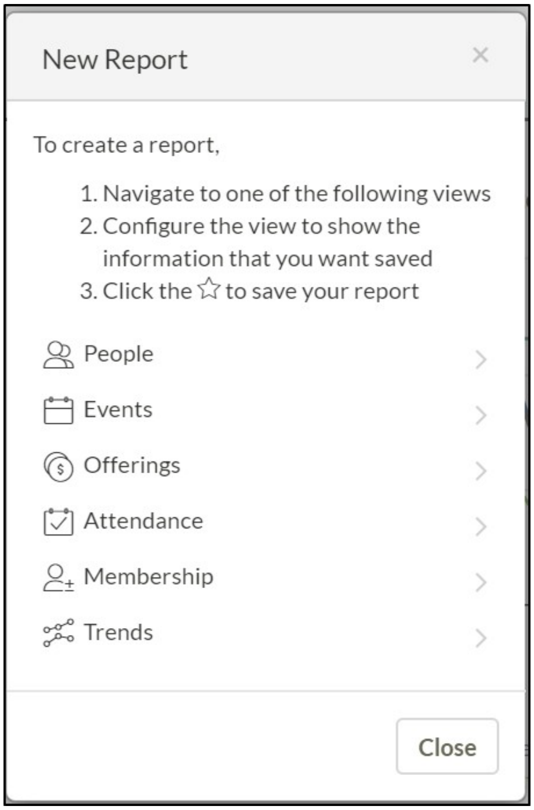
Adding New Reports

Reports save specific views from People, Events, Attendance, Offerings, Membership, or Trends.

Reports save information you view, email, or print frequently; they save you from defining your view every time you need to email a group of people or view attendance for a specific date range. For example, if you email the same ushers and greeters every week to send out the schedule, adding a report of your ushers and greeters will allow you to quickly and easily do so.

1. Click "Reports" in the Primary Navigation at the top of the screen.
2. Click the "New" button next to the"Reports" heading.
3. Select the report you want to create—either People, Events, Offerings, Attendance, Membership, or Trends. After selecting your report, the view you specified will open.
4. Filter this view until you have the desired Smart Groups, Tags, dates, or batches selected.
5. Click "Save Report" in the top right corner of the page to save the view. Your new report will appear in the Reports view under "Starred Reports."

Note: All reports that you create are automatically Starred Reports. If you "un-star" a report that you created, it will be deleted.



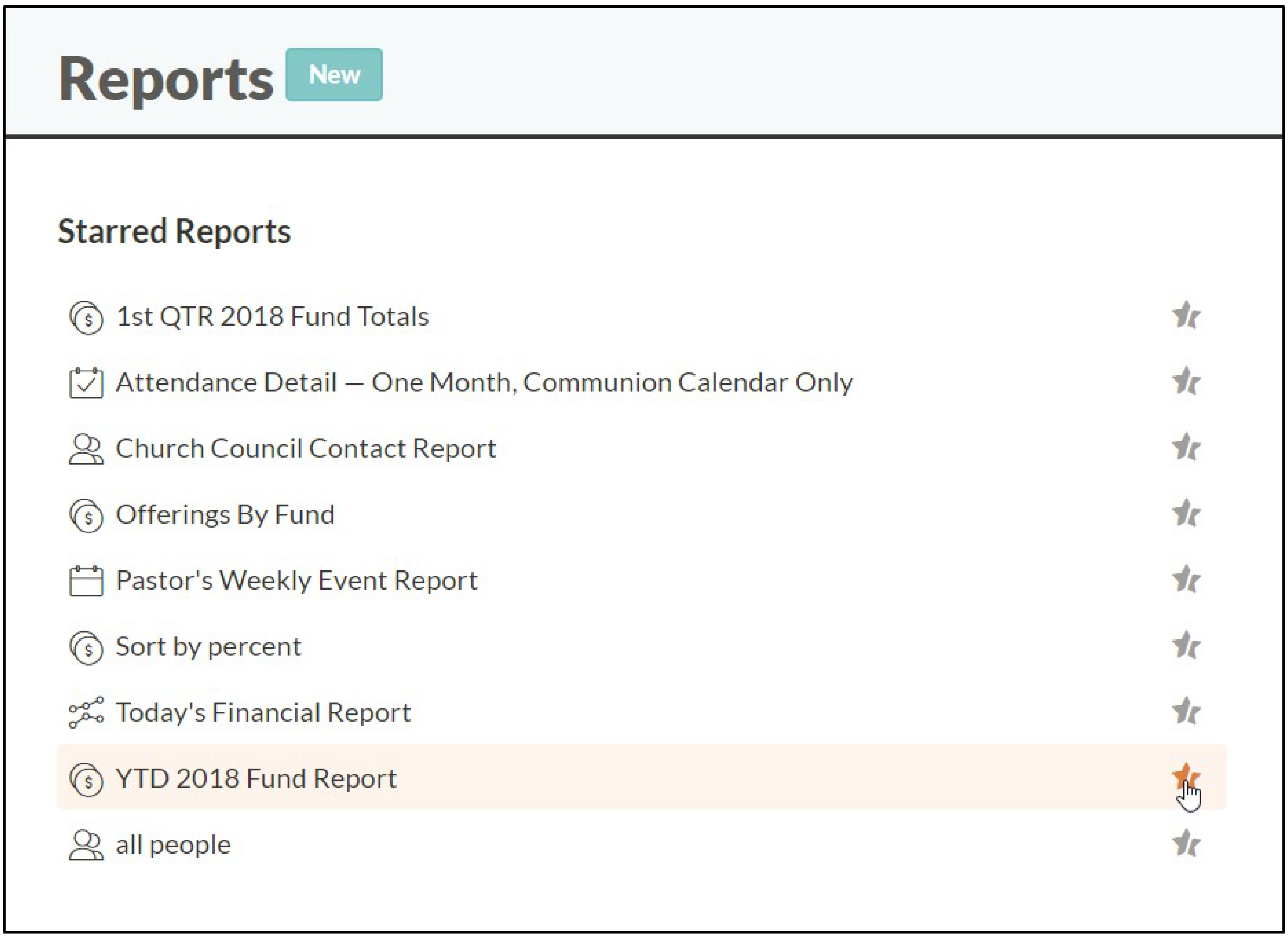
Deleting Reports

Reports created by you that are outdated or no longer in use can be deleted from the Reports view.

Default Reports cannot be deleted;these can be starred and un-starred asneeded.

1. Click on "Reports" in the Primary Navigation at the top of the screen.
2. Under "Starred Reports," find the report you wish to delete.
3. Click on the broken star to the right of the report.

Note: If you "un-star" a Default Report, it will return to "All Reports" and will not be deleted.



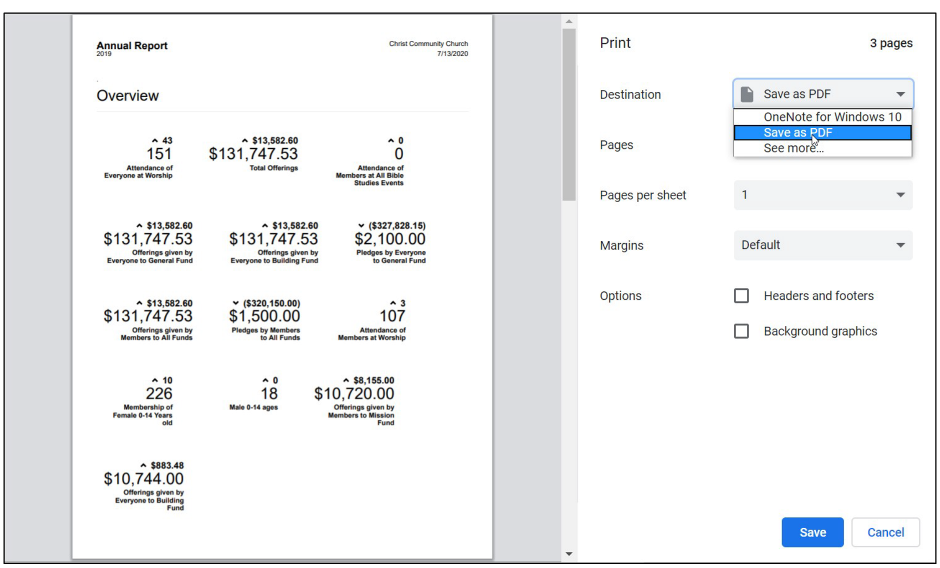
Generating Annual Reports

In Church360º Members, you can print annual reports for your church's denomination. These reports will include specific statistics and information about your church.

Rather than you recording all of this information for each report,Church360º Members will automatically enter the information from your site and generate the reports for you.

1. Click "Reports" in the Primary Navigation at the top of the screen.
2. Under "All Reports," click "Annual Report."
3. Select the year for your report, using the arrows next to the year.
4. Add any trends to your report, using the "Add Trend" button.
5. Check the settings for your membership demographics by clicking on the Settings cog within the Reports view.
6. Check your data health by scrolling down to the Accuracy section.
7. Click on the items listed to be taken to a view where you can edit individual profiles to complete the information.
8. Once your data is ready, click the "Print"button. Your report will appear in a new tab in your browser.
9. To print the report, click CTRL+P or "File"and "Print."

Note: If your report needs to be emailed to your denomination, you may save the report as a PDF rather than sending it to your printer.



Comparing Trends

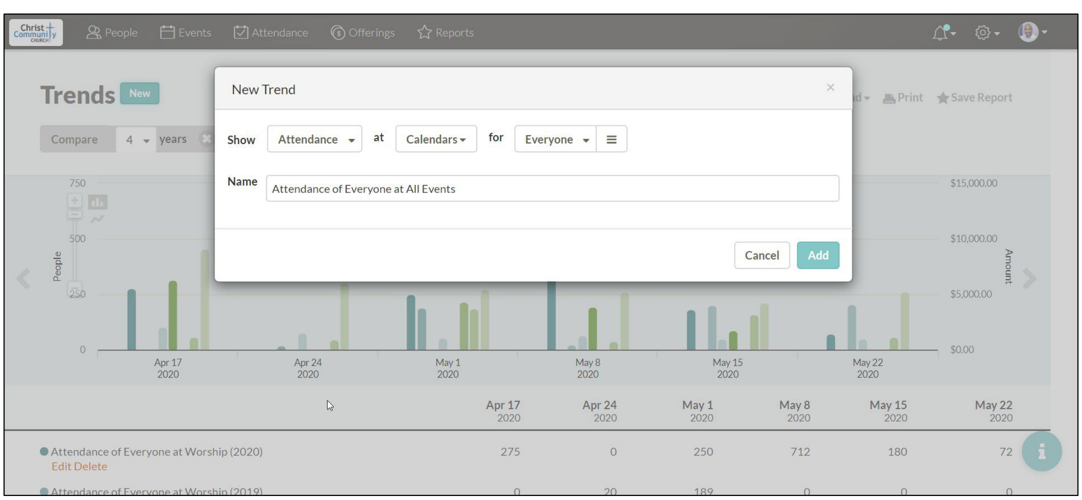
A Trends Report compares statistics across years. You can compare any statistics—Attendance, Offerings, Pledges, or Membership—from any event, by any group of people.

Trends graphically represent the numbers of your congregation. The graph allows you to easily compare giving from year-to-year, to notice spikes or declines in attendance, or to track an event's success over the years.

1. Click "Reports" in the Primary Navigation at the top of the screen.
2. Click the "New" button next to the "Reports"heading. Select "Trends."
3. Click the "New" button next to the "Trends"heading.
4. Specify which criteria you want to compare, at which event, and from which group of people.
5. Choose a name for your trend. Click the"Add Trend" button to create your trend.
6. To compare trends over time, click the"Compare" button underneath the "Trends"heading.
7. Select the number of years you want to compare. The graph on the screen will visually represent the numbers from the criteria you chose.
8. To change from a line to a bar graph, select the appropriate option on the left side of the screen.

Hovering over any of the points on the graph will show the details of that point, such as the name of the trend the point is on, the date, and the statistic.

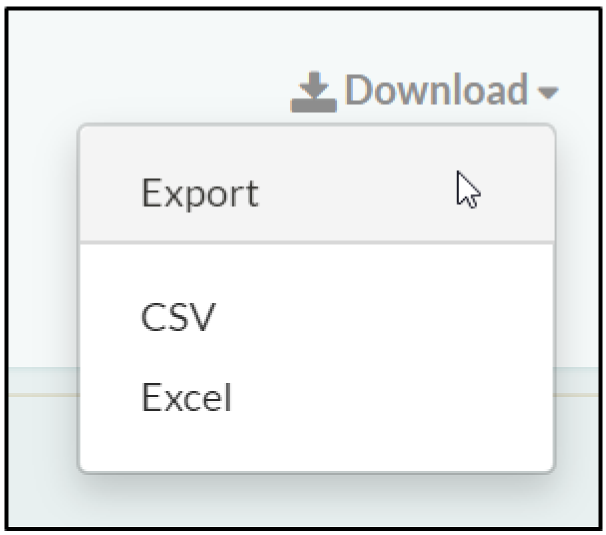
To see more details of a specific trend, click on the name of the trend below the graph to open that trend's details.



Exporting Reports to CSV or Excel

Since reports are essentially statistic data lists for your church, you can export these reports so you can view them in a spreadsheet.

1. Create your report and select it on the Reports page.
2. Click "Download" at the top of the screen.
3. Select either CSV or Excel. Your report will automatically begin to download.
4. Click the file to open it after the download is finished.



Printing Reports

After adding reports in Church360º Members, you may want or need hard copies to share with your congregation.

Printing a report gives you a hard copy of your church's statistical information. When printing trends, the statistics and the chart will print as well.

1. Create your report and select it on the Reports page.Click "Print" at the top of the screen. A newtab will open in your browser.
2. Click CTRL+P or "File" and "Print.

Note: In the top-right corner of the print window, there is a button to switch between portrait and landscape printing.

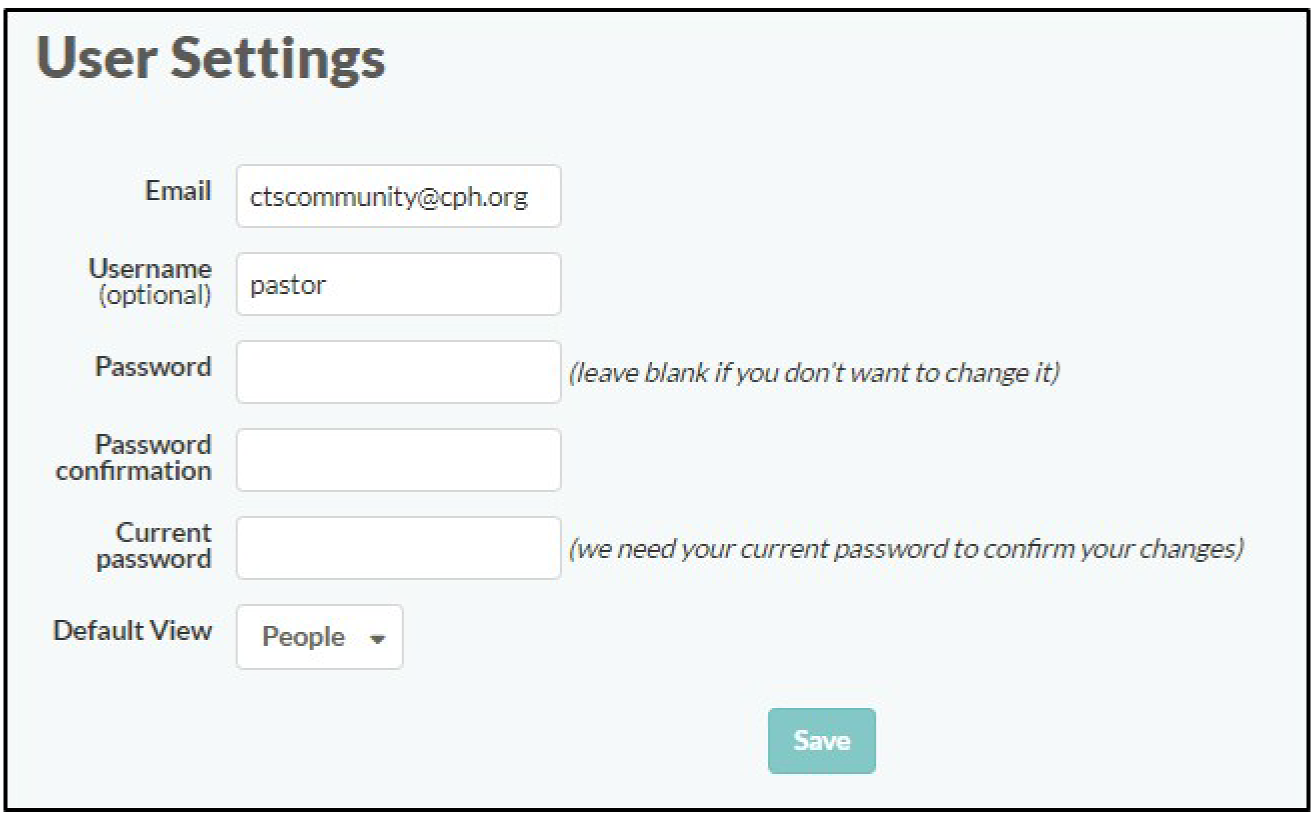
Profile & User Settings

Changing Your User Settings

User Settings allows you to update the email address, username, and password information for your Church360° Members account.

You can also change your default view from within User Settings.

1. Click the gear icon on the right side of the Primary Navigation at the top of the screen.
2. Select "User Settings."
3. Enter your new email, username, or password information.
4. Select your default view for Church360°Members.
5. Click "Save."



The Communications View

Navigating the Communications View

The Communications view includes all additional options for sending out messages to your congregation en masse. This module will allow email, text, and voice messages to be created ahead of time and sent out at a later time.

Action buttons

Like other views, each tab in the Communications view has action buttons for specific tasks.

- Add New Message - This button will open a prompt to create a new email, text, or voice message that you can then schedule for delivery or send out immediately.
- Print - This option allows you to print your list of messages in your grid directly from your browser.
- Export - This action will export all messages into a CSV file that you can edit and share.

Pending Messages

The first section under the Message tab shows all created messages that have not been sent. Above the list is a search bar that can help filter by message title.

The grid itself will display information on each message, including its status, scheduled date (if set), channel, title, who created or scheduled the message, number of recipients, and available message actions.

Message Actions

- Edit Message - The pencil icon to the far right of a message will reopen the message for editing.
- Delete Message - The trash can icon to the far right of a message will delete the message from the view.

Sent Messages

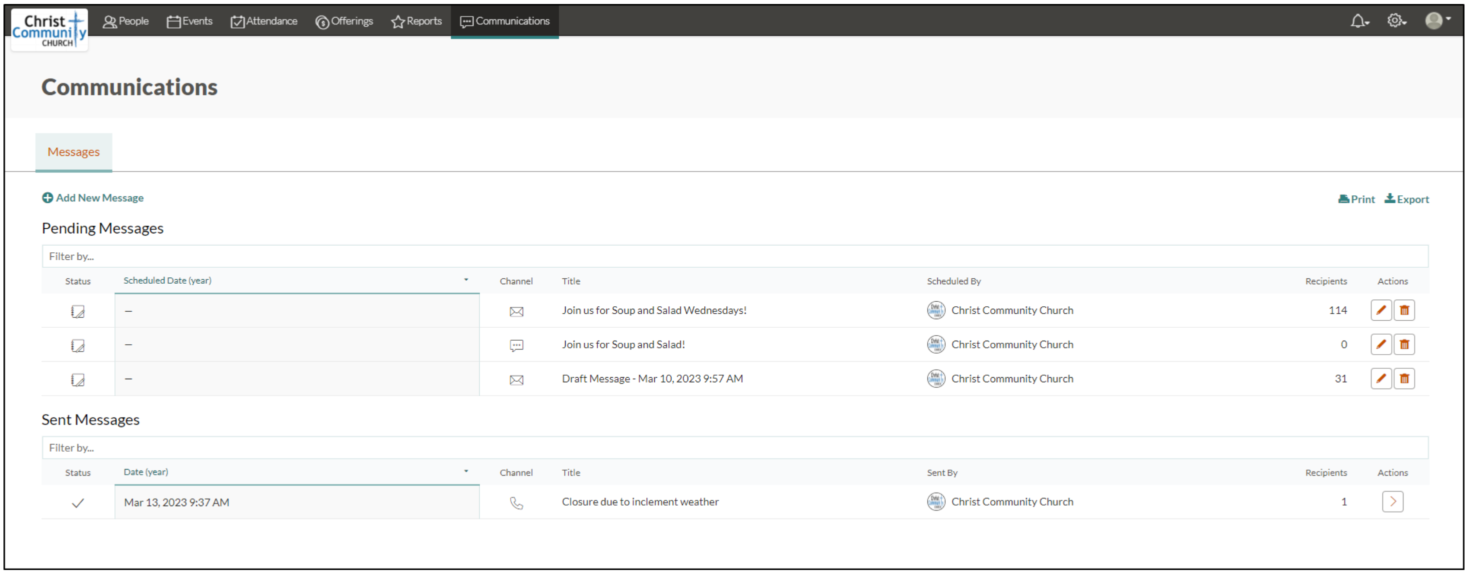
The second section shows all messages that have been sent. Above the list is a search bar that can help filter by message title.

The grid itself will display information on each message, including its status, sent date, channel, title, the login that sent the message sender, number of recipients, and the view message action chevron.

Note: Sent messages cannot be edited or deleted.

Message Actions

- View Statistics - The chevron icon to the far right of a sent message will open its communication statistics, including message details, deliveries, and failure statistics.



Choosing an Audience

When creating a voice, text, or email message, you'll choose Smart Groups, tags, and individuals to be included or excluded as well as which phone numbers or email addresses to be used.

When creating a message, there will be a section called Audience with four drop-down menus.

Under the Include sub-heading, use the first field to choose previously created Smart Groups of people and/or tags that you'd like to add to the list of recipients. For those not included in the available Smart Groups or tags use the field below to add any individuals to the contact list.

Under the Exclude sub-heading, use the first field to choose previously created Smart Groups or tags of people you'd like to subtract from the Smart Groups, Tags, and individuals selected in the Include fields. To remove individuals from the contact list, use the field below.

As you add and subtract who to send your message to, the statistics directly under the fields will update to show the number of People in this audience, the Number of unique contact points selected, and those People without a number selected.

To review your audience's contact information, click the Review button to open up the running list of selected individuals and their available contact information.

By default, the Communications module will only select one contact point for each individual. At the top of the Recipients list, you can click each selection priority to select and deselect each option to order which contact type to choose from first. You can also manually check the boxes next to each contact to select them to use.

Note: manual selections are not affected by changes to the Selection Priority.

If a number is selected multiple times in your Recipients view, it will register as one number selected and will only receive one message.

Once you are satisfied with the contacts selected, click Done to return to your the Audience view.

Note: The middle number (Numbers selected) will be the total number of messages sent.

Audieince

Indu:de

[- Q Members][O!Visitor] ...

[x David Alexander][x Carmen Carroll][Nollll Roberts] ...
[x Jenifer Robertson]

Exclude

[x O Delinquent:>] ...

[x Dave Abbott][Jacob Abbott][Lacey Abbott] ...
[x Sue Abbott][x Lina Chung]

Review)

107
People in this .iudienoe

43
Emails selected

63
People without an.email.iddress selected

Recipients

Selection priority: preferred 1 personal 2 home 4 work 3 household 5

N,rn.e	Emai l ,addresses
Diedr,e Barber	*No email addresses*
Julie Billings	julie.billings@teleworm.us (personal)
Claire Bowen	*No email addresses*
Rick Bowen	*No email addresses*
Howard Brown	***No email addresses***
Teresa Carter	cartert@tel,eworm.us **(personal)** 0 karter@c:tiristcommunitychurch.org **(work)**
James Collins	jaoollins@ietable.org **(personal)** 0 james.collins@starbright.com **[work)**

107
People in this audienoe

43
Emails selected

63
People without anemailaddress selected

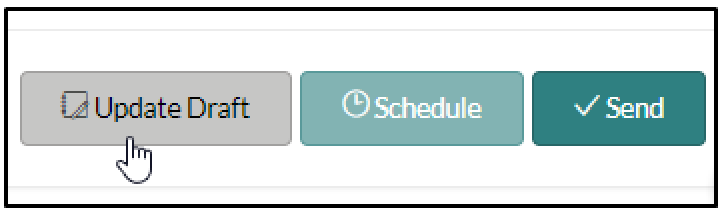
Saving, Sending or Scheduling a Message

After you've created a message, you can choose to send it immediately or schedule it to be sent at a later time.

At the end of your message, there will be action buttons that you can choose.

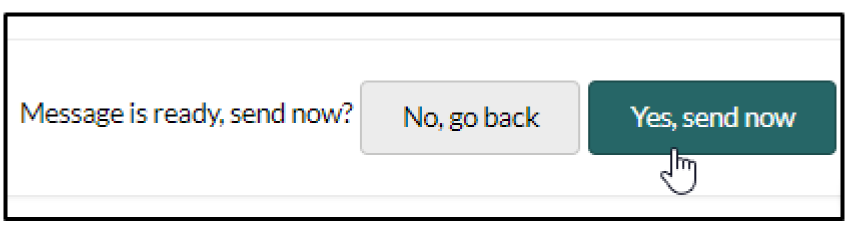
To save the message,

1. Click the "Save Draft" or "Update Draft" button to save the message to the main Communications view without sending it.
2. You will be able to edit this message before scheduling and sending it at a later time.



To send the message,

1. Click the "Send" button to send the message immediately to your audience.
2. Once the voice blast has been sent, you will be able to review the statistics from the Communications view



To schedule the message,

1. Click the "Schedule" button to set a date and time for your message to be sent to all chosen recipients.
2. You will be able to edit this message from the Communication view.
3. If you find you want to send out your scheduled message earlier, you can open up your pending message and click the "Send" button.

0:00;0:25

DELETE

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This message v,

< March "" 2023 >

Sun	Mon	Tu:e	Wed	Thu	Fri	Sat
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5	6	7	8	9		11
12	13	14	15	16		18
19	20	21	22	23	24	25
26	27	28	29	30	31	
2	3	4	5	6	7	

05 00 ... PM

a

Message is ready,,.chedu I e to send on Mar 17 023 5:00 PM El No,goback Yes, send later

Editing a Message

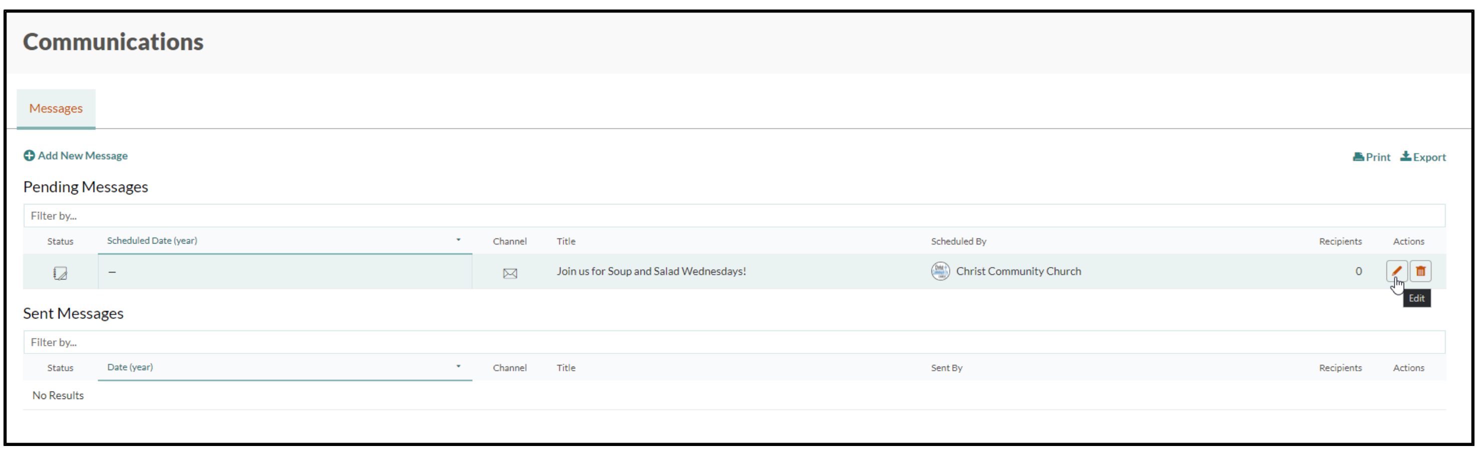
If you have a Communications message in draft or scheduled status, you can add and edit features of the message up until it's actually sent.

Note: Sent messages can be reviewed for statistics but cannot be edited.

To edit an unsent message,

1. Go to the Communications view. If Communications is not shown on the main Menu bar, there is a chance your login may not have permission to access this view.
2. Under Pending Messages, locate the message you'd like to edit.
3. Click the pencil icon to the far right of the row under Actions. This will open up the message for additions and edits.
4. You can edit the message type, title, audience, contacts, or recreate your message as you need.
5. After finishing your message, choose your desired action from the buttons at the bottom of the page.
    - Cancel - This will cancel your message permanently and return you to the main Communications screen.
    - Save Draft / Update Draft - This will save the message to the main Communications screen without sending it. You will be able to edit this message before scheduling and sending it at a later time.
    - Schedule - This will allow you to set a date and time for your message to be sent to all chosen recipients.
    - Send - This will send your message out immediately to all chosen recipients.

6. Once the message has been sent, you will be able to review its statistics from the main Communications view under Sent Messages.

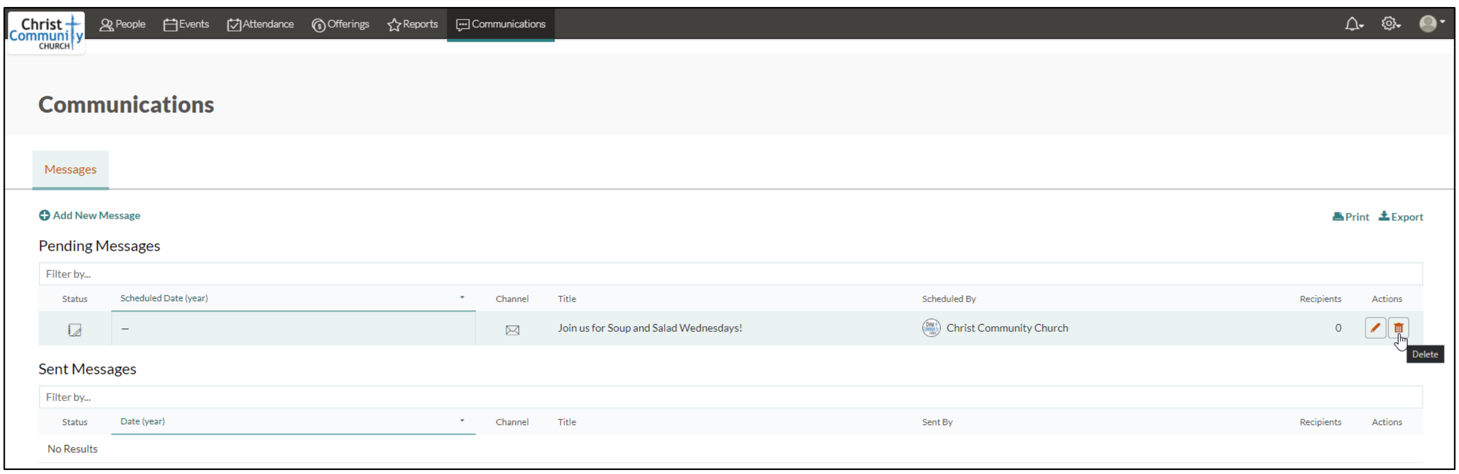


Deleting a Message

If you have a Communications message in a draft or a scheduled status, you can delete the message entirely up until it's actually sent. Sent messages can be reviewed for statistics but cannot be deleted.

To edit an unsent message,

1. Go to the Communications view. If Communications is not shown on the upper toolbar, your login may not have permission to access this area.
2. Under Pending Messages, locate the message you'd like to delete.
3. Click the trash icon to the far right of the row under Actions. A deletion cannot be undone so be sure this is the message you want to remove.



Navigating Communication Settings

In your Account Settings, Church360 Members allows users to create templates, defaults, and message types for your Communication module.

To access your Communication settings, users can go to the gear icon to find Account settings.

It's worth noting that users will need to have administrator-level permissions to access Account Settings, and consequentially, Communication Settings. Under Account Settings, click a section on the menu to the left to go to that section.

Email

Settings related to emailing through the Communication view are found here.

Under the Edit template for section, users can use the drop-down menu to select the template for a message type to edit the contents of the template. In the text box below the menu, type additions or edits to the template.

Under Email Sending Name, add the name you would like associated with the emails sent from the Communication view. This will not include emails sent from the People view via your email client; those emails are sent by the default email account on your computer.

Under Email Sending Address, add the email address you would like associated with the emails sent from the Communication view. This will not include emails sent from the People view via your email client; those emails are sent by the default email account on your computer.

Email Selection Priority will help you quickly choose email addresses by type for each person to be used when a message is sent. If the type chosen as priority number one is unavailable for a chosen person record, the next available type will be selected. You can always review your email addresses and tweak priority settings while choosing your audience for your message.

Texting

Settings related to sending text messages through the Communication view are found here.

Under the Personalized Opt-in Message section, you'll be able to create a default personalized opt-in message to email to your congregation to sign up for text messages. You'll send out this message from the

Texting view under the settings gear in the upper right-hand side of the screen or by going to the bottom of the account setting page to Opt-in > Texting.

Under "Edit template for", users can use the drop-down menu to select the template for a message type to edit the contents fo the template. In the text box below the menu, type additions or edits to your template.

Phone Number Selection Priority will help you quickly choose email addresses by type for each person to be used when a message is sent. If the type chosen as priority number one is unavailable for a chosen person record, the next available type will be selected. You can always review your message and tweak priority settings while choosing your audience for your message.

Voice Messaging

Under Credits, you can see how many credits you have currently for your Communication module and how many credits are to be used soon for messages scheduled to be sent out in the future.

Like text messaging, Phone Number Selection Priority will help choose the phone numbers on someone's record when sending out voice messages. If the type chosen as priority number one is unavailable for a chosen person record, the next available type will be selected. You can always review your phone numbers and tweak priority settings while choosing your audience for your message.

Message Types

Message types are used to group different kinds of messages to help your congregation choose whether they'd like to opt-in or out of certain messages. By default, Announcement, Invitation, Prayer Request, and Reminder types are automatically available. However, you can also click on the "Add new" button to add a new message type. You'll want to keep these message types concise as congregational preferences show each of these as a message group that one can opt out of.

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People Events Attendance Offerings Reports Communications

Gener.ii Settings

Church Information

Primary Contact

Your Plan Information

Grades

Calendar

Tax Information

Communication Settings

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Texting

Voice Messaging

Message Types

Opt-ins

Texting

Texting

Perfi.Onalized Opt-In Me!>>:ilge

Hey. please feel free to use this link to sign up for text messages from Christ Community Church!

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Phone Number Selection Priority

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Voice Messaging

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Message Types

Default Message Types

Announcement

Custom Message Types

Add new

Understanding Communication Preferences

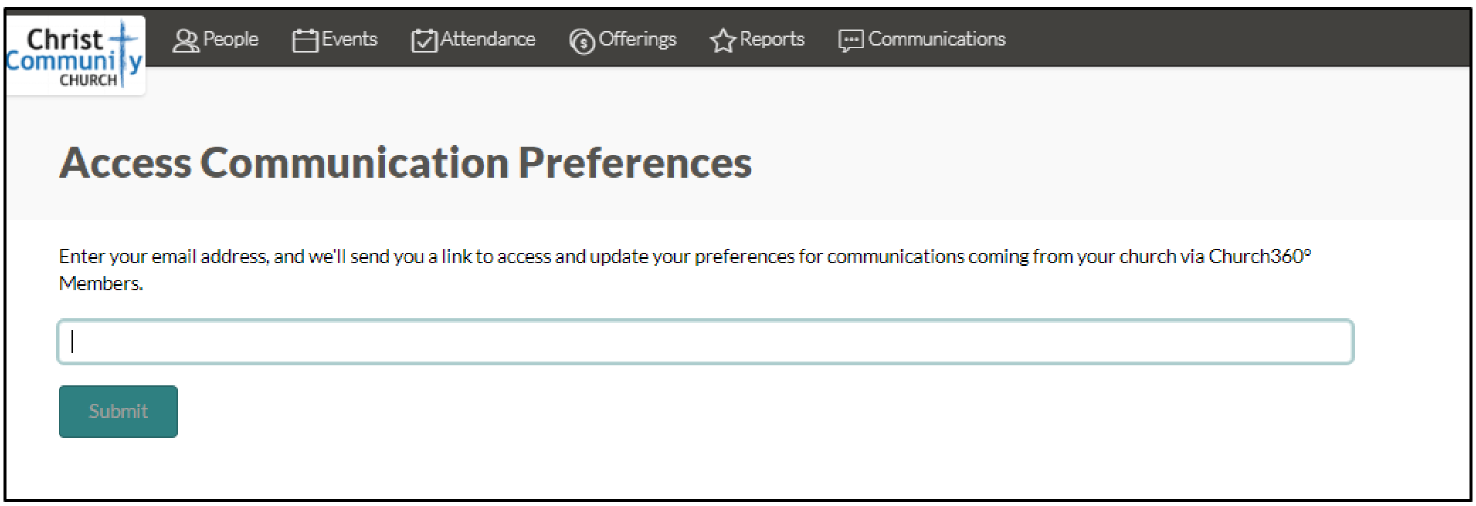
After sending out a few messages through the Communications module, you may have some members of your congregation find that they have preferences on how they'd like to be contacted.

In Church360 Members, anyone with person record (with an email address) on your Church360 site, will be able to visit your site's preference's page, enter in their email address and edit their preferences as they'd like.

To edit your Communication preferences,

1. Go to your church's access page for Communication preferences.
    - The preference page is different for each Church360 Members site. Using the URL ([your subdomain] replaced with your site's unique identifier preceding ".360members.com") of your Church360 site, add "/communications/access-preferences" to the end to be taken to your site's specific preference page.
    - For example, if your Church360 Members site has the URL "christcommchurch.360members.com", then your preference page would be "christcommchurch.360members.com/communications/access-preferences".
    - If you need any assistance with finding your church's preferences page, please feel free to reach out to support by clicking on the "i" icon at the bottom right corner of the help center.
2. Once on the preferences page, enter the email address attached to your person record.
    - For a person to be able to edit their preferences, they will need to have a personal or work email attached to their record.
    - If you receive a "Record not found" error, you will need to contact your site administrator to add your email to your record in order to update your preferences.
    - If your email is valid and accurately attached to your person record, you will get a message stating that you will receive an email with a link to edit your preferences.
    - It may take a few minutes before you see a message. If you still do not see your message after 10 minutes, please check your spam folder for an email titled, "Access your Church360° Communication Preferences".

3. Click the link provided in the email to open up preferences specific to your email. Try not to click unsubscribe as this will only unsubscribe you from important administrative emails related to your preferences in Church360° Members.
4. On the Update Communication Preferences view, use the drop-down menus to choose your preferred contact information and check the boxes next to any message types you'd like to receive messages for.
    - If you are unsure on what each message type entails, please contact your site administrator or staff member for more information on how your church office uses the Communications module.
    - You cannot add additional contact information on this view. You will need to let your church office know if you need to edit or add contact information to your record.
5. Click "Update Preferences" to save your changes. If you need to edit your preferences in the future, you can request another link.



Update Communication Preferences

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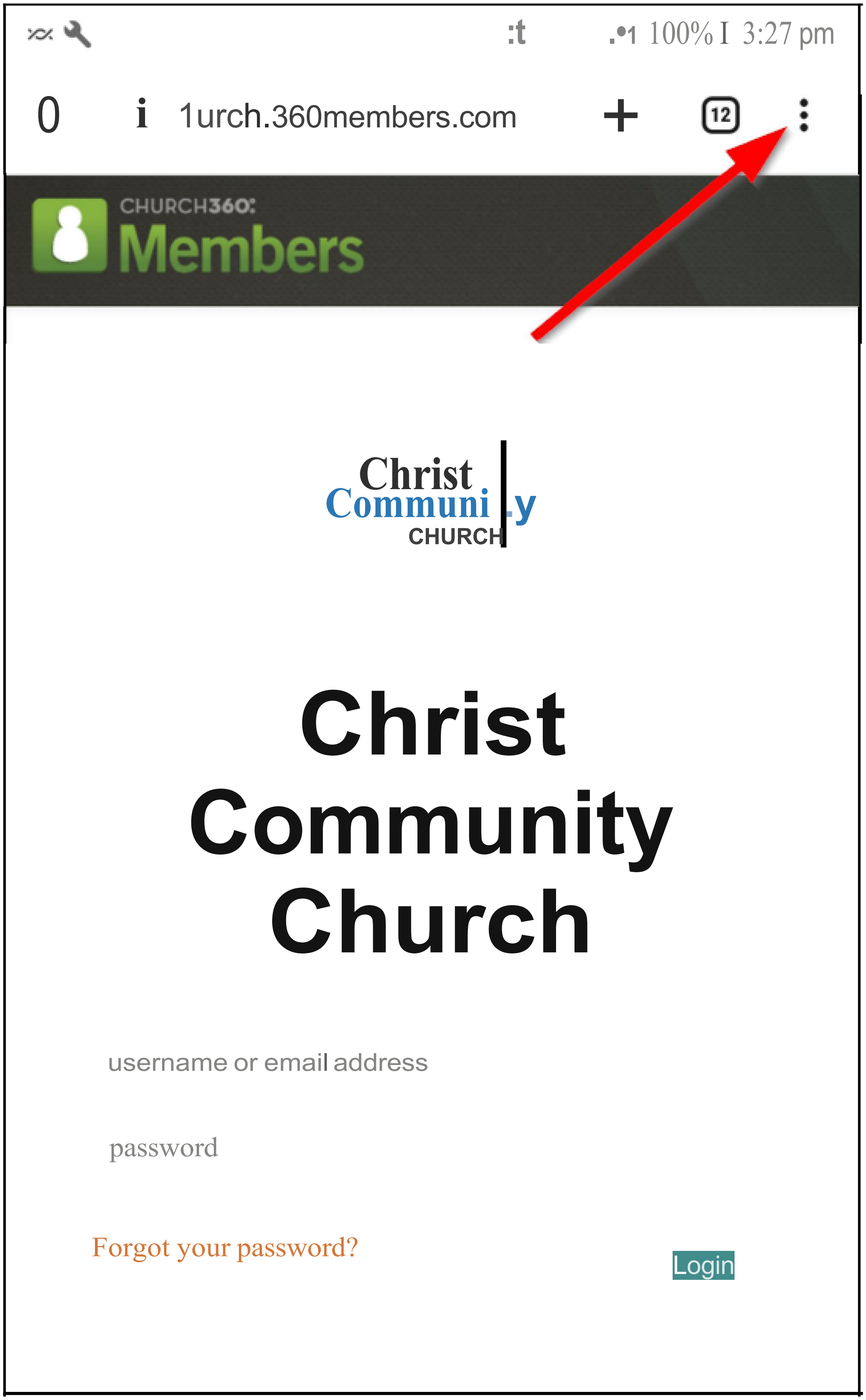
Creating a link for your Church360° site on your cell phone's home screen (Android)

There may come a time when you would like to access some Church360° capabilities not yet available through the Church360° Members app.

In this case, it is recommended that you access your Church360° sites through an internet browser on your device to allow for more maneuverability and access to certain areas of the software, like Attendance, Offerings, or Communications. And instead of needing to search your website every time you need, you can create a URL link on your Home Screen as if accessing an app.

To create a link to your Church360° site on an Android device,

1. Launch your chosen internet browser and navigate to your Church360 site with your church's unique subdomain. If you need any assistance with finding your site, please contact support.
2. While on the page you want to link to, tap on the additional options on your browser's tool bar. For Chrome, click on the three dots to the right of the address bar.
3. In the menu that pops up, scroll down and choose to "Add to Home Screen".
4. Type in a name for your link and click the "Add" button at the top right corner of your screen.
5. Your new web link will appear at the next available space on your Home Screen.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Settings

Help & feedback

Creating a link for your Church360° site on your cell phone's home screen (iOS)

There may come a time when you would like to access some Church360° capabilities not yet available through the Church360° Members app.

In this case, it is recommended that you access your Church360° sites through an internet browser on your device to allow for more maneuverability and access to certain areas of the software, like Attendance, Offerings, or Communications. And instead of needing to search your website every time you need, you can create a URL link on your Home Screen as if accessing an app.

To create a link to your Church360° site on an Apple device,

1. Launch your chosen internet browser and navigate to your Church360 site with your church's unique subdomain. If you need any assistance with finding your site, please contact support.
2. While on the page you want to link to, tap the Share icon at the top or bottom of your screen. This icon will typically look like a box with an arrow pointing up and out of it.
3. In the share screen that pops up, choose to "Add to Home Screen".
    - If you access your Share icon from the top of the screen (usually to the right of the site address), you may need to scroll on the bottom list (where it says "Add to Reading List", "Add Bookmark", etc) to find the "Add to Home Screen" option.
    - If you access your Share icon from the bottom of the screen (typical for most new iPhones), you may need to scroll up (past AirDrop and other sharing options) to find the "Add to Home Screen" option.
4. Type in a name for your link and click the "Add" button at the top right corner of your screen.
5. Your new web link will appear at the next available space on your Home Screen.

Voice

Creating a Voice Message

One of the main features of the Communications view is the ability to record a voice message and send it out to a list of chosen phone numbers.

To send a voice message in the Communications add-on,

1. Go to the Communications View. If Communications is not shown on the upper toolbar, your login may not have permission to access this area.
2. In Communications, click the link to "Add New Message".
3. In the prompt that appears, choose "Voice" as your channel. If you currently have the free version of Church360° Members with Communications, this will be your only option.
4. For your new message, choose a message type that best describes the purpose of your message. Message types can be created under Communication Settings.
5. Type in your message title. This will be used on the main Communications view to show statistics for your message.
6. Using the drop-down menus under the Include heading, choose any Smart Groups or Tags (using the first field) or individuals (using the second field) you want to receive this message. The statistics below the menus will automatically update to show how many people are selected in total as well as the number of selected records that have emails on their record and those that do not.
7. Using the drop-down menus under the Exclude heading, choose any Smart Groups or Tags (using the first field) or individuals (using the second field) you want to subtract from those initially chosen using the Include fields. The statistics below the menus will automatically update to show how many people are selected in total as well as the number of selected records that have emails on their record and those that do not.
8. To the right, click the orange button to start recording your message using a microphone or headset attached to your computer. You'll want to keep your message concise with minimal pauses to ensure your listeners will not hang up before they receive your full message. The maximum recording time is three minutes.
9. Click the orange button to stop recording.
   - Click the orange button to listen to your message.
   - If you want to redo your message, click "Delete" and rerecord your message.

- If you are satisfied with your message, click "Save"

0. After finishing your message, choose your desired action from the buttons at the bottom of the page.
   - Cancel - This will cancel your message permanently and return you to the Communications view.
   - Save Draft / Update Draft - This will save the message to the Communications view without sending it. You will be able to edit this message before scheduling and sending it at a later time.
   - Schedule - This will allow you to set a date and time for your message to be sent to all chosen recipients.
   - Send - This will send your message out immediately to all chosen recipients.

Once the voice blast has been sent, you will be able to review the statistics from the Communications view.

Communication Statistics for Voice Messages

After a voice message has been sent out, users can review the message and its delivery statistics by going into the Communications view, finding the message in question under Sent Messages, and clicking on the arrow to the far right of the row under Actions.

Under Communication Statistics, the first row will show the message title and when the message was sent.

The next section houses the Audience summary, including any Smart Groups and tags used as well as the number of individuals selected for either inclusion or exclusion.

To the right of this section, you can click on the orange play button to play back the message that was delivered.

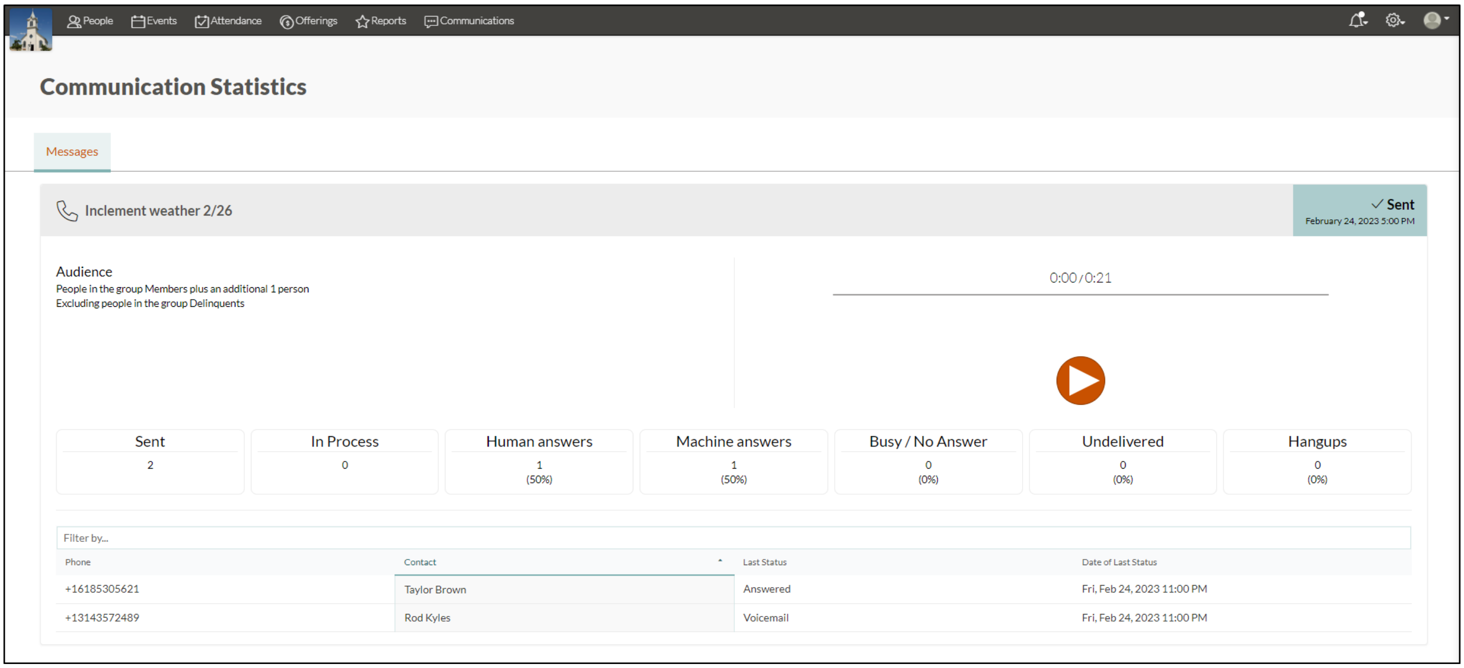
The next row contains a summary of delivery statuses:

- Sent - The number here shows how many numbers were selected for the voice messages that were sent out.
- In Process - This shows if any voice messages are in progress. Once this number drops to zero, users will know that the voice blast has been completed.
- Human answers - This means a phone was manually picked up and connected for at least five seconds.
- Machine answers - This means the message was picked up by an automatic voice messaging system, either an answering machine or a voice mail.
- Busy/No Answer - This indicates that the system picked up a busy signal or otherwise temporarily unavailable message from the contact in question.
- Undelivered - This indicates that the system was unable to deliver the message to the contact in question, usually due to the phone number not existing or being incorrectly formatted.
- Hangups - This status is when a message is picked up either automatically or manually and is hung upon after four seconds and before the end of the message.

For more information on specific numbers, click "Display Event Log" to show each number's delivery status.

- Answered - This status indicates that a person answered the call and stayed connected to hear the message.

- Voicemail - This status shows that a voicemail or answering service took the message.
- Failed - This status shows that the call did not complete and was not delivered. Usually, this status is followed by more information as to why the delivery failed, like an invalid number.
- No Answer - This means the system encountered either a busy signal or another temporarily unavailable message.
- Hang-up - This status indicates that someone answered the call but disconnected the call before the message was finished.



Email

Creating an Email Message

In the Communications module of Church360° Members, you can create and format your message and audience all in one screen.

This is in contrast to emailing via a client, where your chosen emails are grouped into a recipient line within your default email client (where you would then create your message).

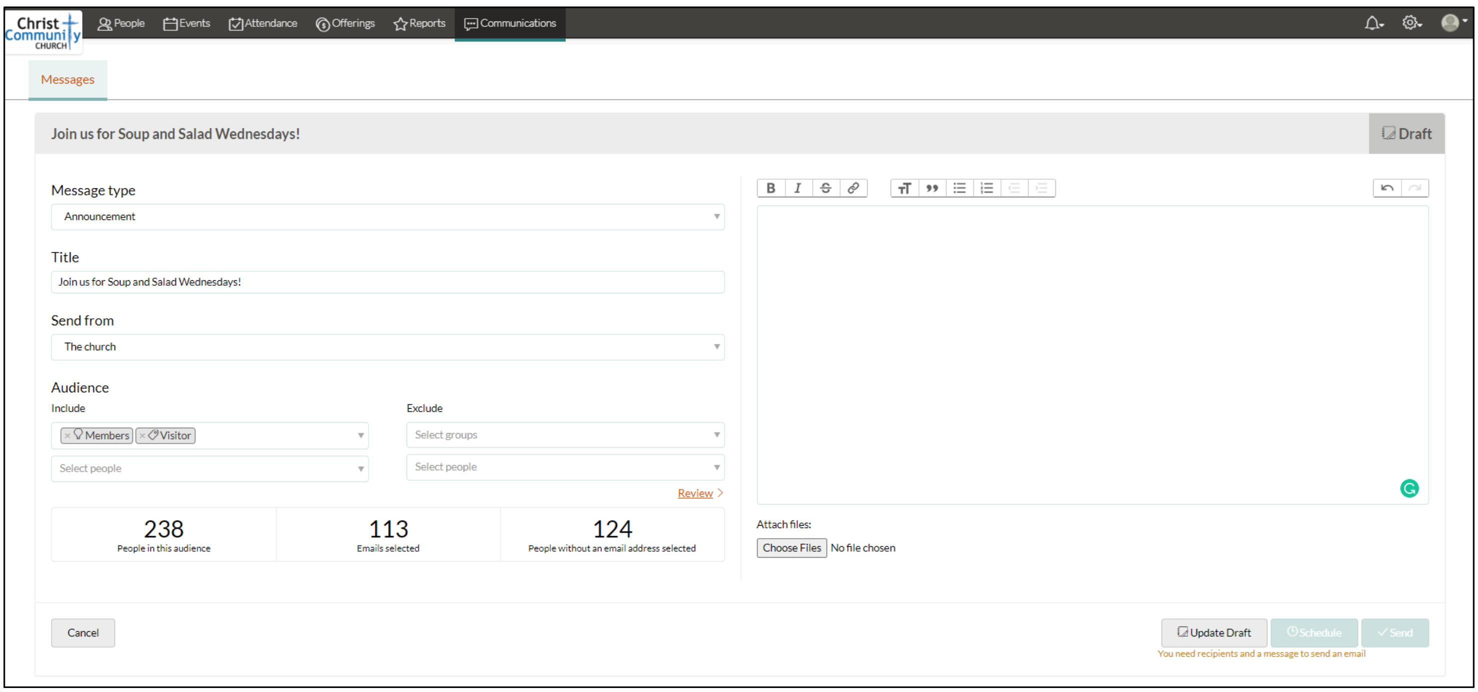
To send an email blast,

1. Go to the Communications view. If Communications is not shown in the menu bar your login may not have permission to access this area.
2. In Communications, click the link to "Add New Message".
3. In the prompt that appears, choose "Email" as your channel.
4. For your new message, choose a message type that best describes the purpose of your message. Message types can be created under Communication Settings.
5. Type in your message title. This will be used on the main Communications view to show statistics for your message.
6. Using the drop-down menu, choose who you'd like this email to be addressed from. If it is from the church, the email will be sent from email@email.church360.org and have your church name as it appears in Account Settings. If it is from you, it will be from the email used to log into your account (followed by @email.church360.org) and have your name as it appears in User Settings.
7. Using the drop-down menus under the Include heading, choose any Smart Groups or tags (using the first field) or individuals (using the second field) you want to receive this message. The statistics below the menus will automatically update to show how many people are selected in total as well as the number of selected records that have emails on their record and those that do not.
8. Using the drop-down menus under the Exclude heading, choose any Smart Groups and tags (using the first field) or individuals (using the second field) you want to subtract from those initially chosen using the Include fields. The statistics below the menus will automatically update to show how many people are selected in total as well as the number of selected records that have emails on their record and those that do not.
9. In the lower section of the screen, type or paste your message into the text editor. For more information on composing your message, please visit our article going into more detail here.

0. Once finished with the text of the message, click to "Choose Files" under Attach files to add an attachment to the message if desired.

1. After composing your message, choose your desired action from the buttons at the bottom of the page.

    - Cancel - This will cancel your message permanently and return you to the main Communications screen.
    - Save Draft - This will save the message to the Communications view without sending it. You will be able to edit this message before scheduling and sending it at a later time.
    - Schedule - This will allow you to set a date and time for your message to be sent to all chosen recipients.
    - Send - This will send your message out immediately to all chosen recipients.



Composing an Email Message with the Text Editor

When creating an email message, you'll use the text editor to create the body of your message. You will be able to type or paste a message into the text editor.

This content box houses features very similar to an email client so you can compose the message directly within the Church360° software.

These features are denoted by buttons found at the top of the text editor.

The first group of buttons has actions you can use for specific text in your message.

- Text buttons - The first three buttons (Bold, Italic, Strikethrough) pertain to the formatting of your text. Simply select your text and click the button for your chosen task to apply the action.
- Link - When clicking the chain-link button, enter the URL for the link you desire into the pop-up that appears and click "Link" to add it. Your link will show as orange in your message. To remove the link, highlight the linked text, click the chain-link button, and click "Unlink".

The second grouping of buttons affects entire text lines.

- Heading - Click this toggle button to change the entire text line into a heading format.
- Quote - This button will indent a text line with a bar denoting a quote. This can be helpful for scripture readings or direct quotations from the church pastor or president.
- Bullets - This action applies bullets starting with the current text line. Bullet points are best for listing things that have no set order
- Numbers - This action applies number bullets starting with the current text line. Numbering bullets are best for listing things with a set, or preferred, order.
- Indenting buttons - The next two buttons (Decrease Level, Increase Level) are greyed out and are only available when currently on a line with either the Bullets or Numbers action being applied.

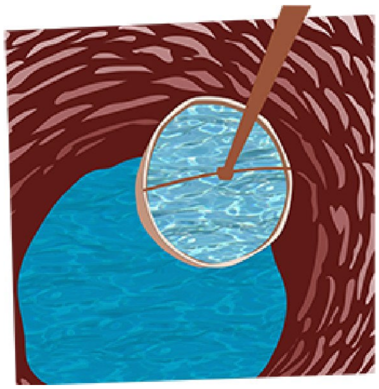
The final grouping of buttons is located on the far right of the text editor.

- Undo - This will remove the last action or revision to your message.
- Redo - This will reapply an action that had been undone.

[BI -S &] r r

Hello!!

Join us Sunday to learn about Giving living Water1



Third Sunday in Lent

Attad1files:

| Choose Files | Nofi1lechosen

Attaclhed files:

File Name	Size	Actions
Worslhip Program March 12 2023.pdf	4.8KB	
Prayer List Marclh12 2023.pdf	4.8KB	

Total sii:e: 9.6 KB

C;J Update Draft Schedule ✓ Send 8

Communication Statistics for Email Messages

After an email message has been sent out, users can review the message and its delivery statistics by going into the Communications view, finding the message in question under Sent Messages, and clicking on the arrow to the far right of the row under Actions.

Under Communication Statistics, the first row will show the message title and when the message was sent.

The next section houses the Audience summary, including any Smart Groups and tags used as well as the number of individuals selected for either inclusion or exclusion.

To the right of this section, you can see the message sent and the filename of any attachments added to the message.

The next row contains a summary of delivery statuses:

- Sent - The number here shows how many email addresses were selected for the email blast and sent.
- In Process - This shows if any messages are currently in progress. Once this number drops to zero, users will know that the blast has been completed.
- Delivered - This shows that the message was successfully sent to the person's inbox with no delivery failure messages.
- Undelivered - This indicates that the system was unable to deliver the message to the contact in question, usually due to the email address existing or being incorrect.
- Opens - This shows when an email has been opened for viewing.
- Clicks - This shows when a link within the email has been clicked while in a person's inbox.

For more information on specific numbers, click "Display Event Log" to show each number's delivery status.

- Delivered - This status indicates that the system received a status of delivered, for the email that was sent.
- Opened - This shows when an email has been opened for viewing.
- Failed - This status shows that the email did not complete its delivery. Usually, this status is followed by more information as to why the delivery failed, like an invalid email address.

Communication Statistics

Messages

Reminder: Choir Practice Rescheduled

Sent

Sent By
Th€ Big Church (rod.kyles@cph.org)

Audience
People in the group Choir plus an additional 1 person

Message

Don't forget. our practice wasrescheduled for tonight See yoo at 6!

Sent	In Process	Delivered	Undelivered	Opens	Clicks
		2 (100%)	0 (0%)	0 (0%)	0 (0%)

Filter by_,

rod.kyles@cph.org	Rod Kyles	Delivered	Mon.Mar 13-, 20234:00 PM
kimberly.moon@cph.org	Kimberly Moon	Delivered	Mon,Mar 13-, 20234:00 PM

Texting

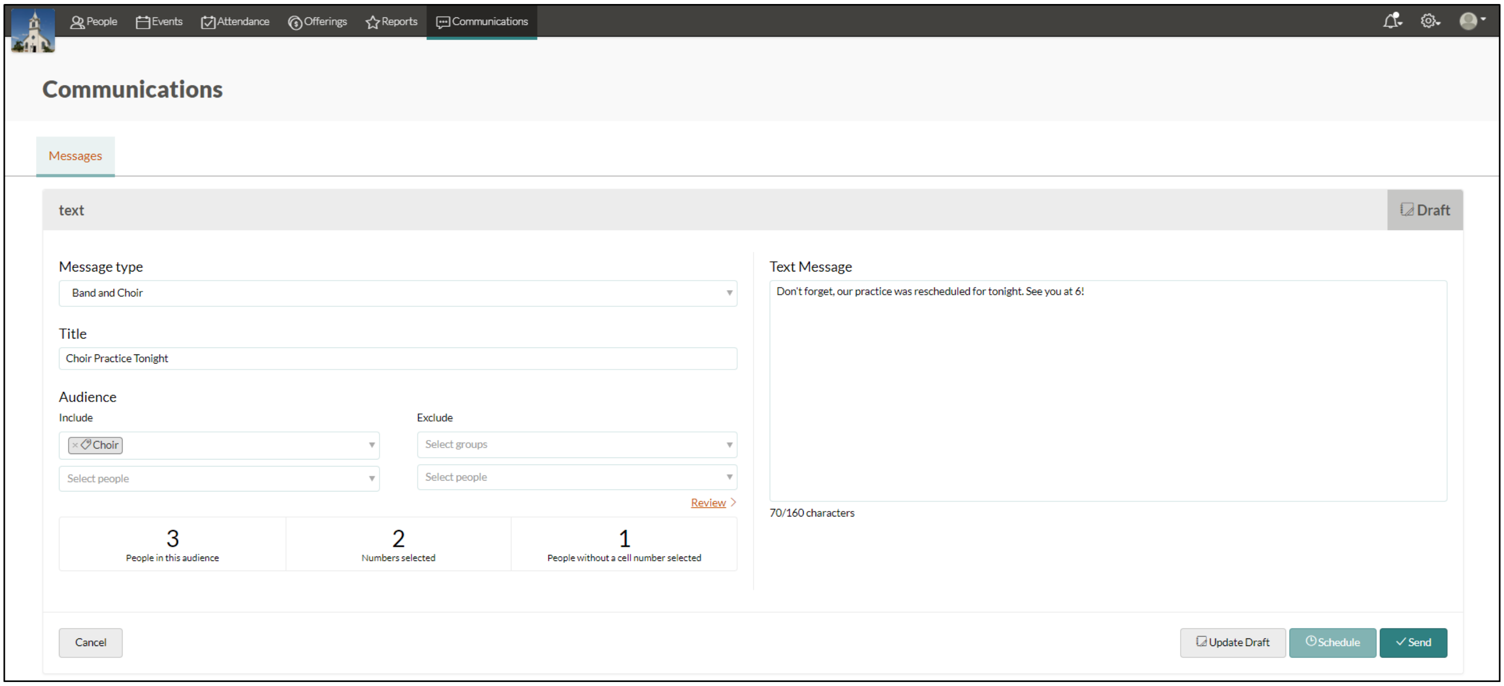
Creating a Text Message Blast

In the Communications view of Church360° Members, you can create and format a text message and assign an audience all in one screen.

To send a text in the Communications view,

1. Go to the Communications view. If Communications is not shown in the menu bar, your login may not have permission to access this area.
2. In Communications, click the link to "Add New Message".
3. In the prompt that appears, choose "Text" as your channel.
4. For your new message, choose a message type that best describes the purpose of your message. Message types can be created under Communication Settings.
5. Type in your message title. This will be used in the Communications view to show statistics for your message.
6. Using the drop-down menus under the Include heading, choose any Smart Groups or Tags (using the first field) or individuals (using the second field) you want to receive this message. The statistics below the menus will automatically update to show how many people are selected in total as well as the number of selected records that have phone numbers on their record and those that do not.
7. Using the drop-down menus under the Exclude heading, choose any Smart Groups or Tags (using the first field) or individuals (using the second field) you want to subtract from those initially chosen using the Include fields. The statistics below the menus will automatically update to show how many people are selected in total as well as the number of selected records that have phone numbers on their record and those that do not.
8. After selecting the groups and persons for your Audience, click the "Review >" link to review the phone numbers used for each person. Click "Done" once your review is complete.
9. In the lower section of the screen, type or paste your message into the text editor. Text messages have a 160-character limit.
0. After composing your message, choose your desired action from the buttons at the bottom of the page.
    - Cancel - This will cancel your message permanently and return you to the Communications view.
    - Save Draft - This will save the message to the Communications view without sending it. You will be able to edit this message before scheduling and sending it at a later time.

- Schedule - This will allow you to set a date and time for your message to be sent to all chosen recipients.
- Send - This will send your message out immediately to all chosen recipients.



Communication Statistics for Text Messages

After a text message has been sent out, users can review the message and its delivery statistics by going into the Communications view, finding the message in question under Sent Messages, and clicking on the arrow to the far right of the row under Actions.

Under Communication Statistics, the first row will show the message title and when the message was sent.

The next section houses the Audience summary, including any Smart Groups and tags used as well as the number of individuals selected for either inclusion or exclusion.

To the right of this section, you can see the message that was sent.

The next row contains a summary of delivery statuses:

- Sent - The number here shows how many phone numbers were selected for the text message and were sent by the system.
- In Process - This shows if any messages are currently in the progress of being sent. Once this number drops to zero, users will know that the blast has been completed.
- Delivered - This shows that the message was successfully sent to the person's phone with no delivery failure messages.
- Undelivered - This indicates that the system sent an undeliverable message to the contact in question, usually due to the phone number not existing or being incorrectly formatted.

For more information on specific numbers, click "Display Event Log" to show each number's delivery status.

- Delivered - This status indicates that a person's phone registered the text message as delivered.
- Failed - This status shows that the text did not complete its delivery. Usually, this status is followed by more information as to why the delivery failed, like an invalid number.

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Communications

Messages

text

Message type

Band andChoir

Title

Choir Practice Tonight

Audience

Include

Selectpeople

Exclude

Select groups.

Select people

Text Message

Don't focget our practice was rescheduled for tonight. See you at 6!

70/160characte-rs

3
People in this audience

2

1
People without a cell number selected

Cancel

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