Church360° Members

People

Navigating the People View

The People view of Church360° Members is probably the most accessed view, housing all of your congregation's information.

Modes

One unique feature of the People view is its modes, which group and display a variety of selectable and sortable columns. Click the subheading located next to the People heading at the top of the page to choose between each option.

The People view offers four different modes and two additional views to help with tracking your congregation's information.

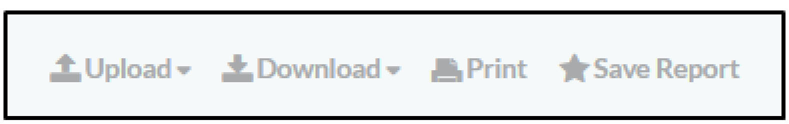
- Individuals - Each row belongs to an individual record, showing personal and membership information specific only to that one person. This mode is best for generating quick lists and spreadsheets of people's information, as well as mailing labels and directories for individual people.
- Households - Each row belongs to a household record, showing the address and contact information pertaining to all members of the household. This mode offers mailing labels and directories grouped by household.
- Givers - Each row belongs to a single giver record, either an individual or a married couple. This mode offers mailing labels with either the current or next envelope number and is best for printing envelope lists before and after a renumbering.
- Marriages - Each row belongs to a married couple, showing giving and anniversary information. This mode can be used for anniversary lists and to show which couples give jointly.
- Pastoral Visits - This view offers the ability to schedule visits to members of your congregation, assigning who is to be visited, who will do the visiting, and type of visit.
- Church Register - This view offers the ability to record significant events both for those with person records in the system and those without.

Action Buttons

Near the top right corner of most views, there will be buttons available for specific tasks related to the records and settings in the view.

In the People view, there are options to Upload, Download, Print, and Save Reports.

- Upload - Here, you can upload information from a vCard or, if you are a former Shepherd's Staff user, you can upload your Shepherd's Staff database to your Church360° Members site. More information is available in our articles about uploading your Shepherd's Staff database and what fields do not import to your site.
- Download - On the People view, you can export lists of people and their information to a spreadsheet, either in Excel or CSV format. Downloads for contribution statements, directories, and mailing labels are also available. All downloads will specifically filter based on which records are visible and/or checked.
- Print - This option allows you to print your list of visible records and information directly from your browser. Printing options will be limited to your browser's capabilities and some columns may be cut off, depending on how many are selected. In the upper right, you can choose page orientation before printing.
- Save Report - This option allows you to save the columns and layout of your current view. You can access your saved reports at any time by clicking on the Reports page in the Primary Navigation bar.

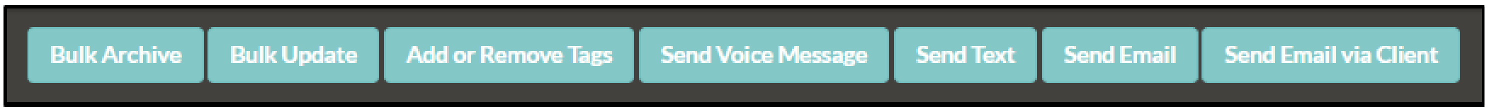


Bulk Utilities

When selecting a record in the People view, you may notice a dark bar appear with available tasks for the selected people.

- Bulk Archive - This button will send all selected records to the archive and will hide their information from all other views and reports, including the Annual report. This option is available only in Individuals mode.
- Bulk Update - This mass update utility allows you to change a baptism date, confirmation date, Ethnic Group, Grade, Household, or Sex of all selected persons. This utility is available only for Individuals and Households. Custom fields are available depending on the mode.
- Add or Remove Tags - With this tool, you can add and remove tags in bulk. Though you can assign tags in any mode, the tags themselves are applied only to individual records, not household or giving records.

- Send Voice Message - This will open up a new message in the Communications module to begin creating a voice message blast.
- Send Text - This will open up a new message in the Communications module or a window to select the opted-in cell numbers of those selected to send a mass text message through Church360°'s Twilio relay.
- Send Email - This will open up a new message in the Communications module to begin creating an email message blast.
- Send Email via Client- This will open up a window to select the email addresses of those selected to send a mass email through the default email client on your computer.



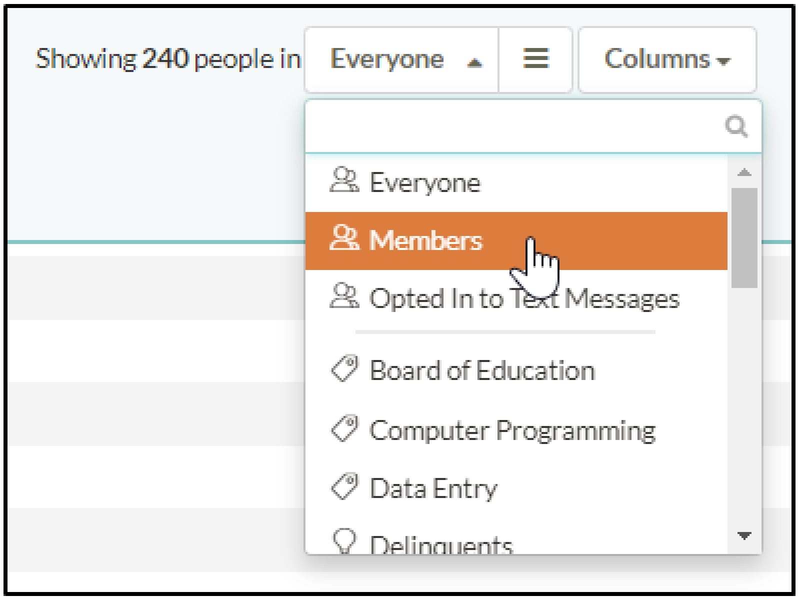
Drop-Down Menus

Under the Action buttons, there are drop-down menus that can be used to filter your current People view.

The left drop-down will contain three default groups, including Everyone, Members, and Opted In to Text Messages. These cannot be edited or removed. Under the default groups, you will find a list of all Smart Groups (denoted with a lightbulb icon) and Tags (denoted with a tag icon) that you can select to automatically filter your view. At the very bottom of the list will be the Archived list.

Between the two drop-down menus is a button with three lines on it. This will open up the Smart Group Trait drawer to access specific criteria to filter your view. For more information on Smart Group Traits, please visit our article on the topic.

The right drop-down menu is labeled Columns. This will allow you to choose which fields are shown on the view.



Records

When working in your People view, you may notice some symbols or icons next to certain information.

The cross next to a person's name denotes them as having passed away.

A triangle with an explanation point in it denotes one of three errors. Hovering over the icon will show a message with more information.

- This is a duplicate name - This message means there is another record, either in the main database or the archive, with the same preferred and last name as this record. Editing one of the records' name and resaving will remove this flag.
- This address is invalid - This message means there is either a syntax or server error in the email address' entry. Correcting this and resaving will remove this flag.
- This number was unreachable at the last text or voice delivery attempt - This message means this number was sent either a voice blast or text message and came back undeliverable. Sending a phone message successfully will remove this flag.

Viewing Different Modes of the People View

Under the People view heading, there are four modes to choose from when reviewing or searching person records. Each view contains different fields that can be searched and filtered by, as well as different report offerings.

For more information on the other views under People, Pastoral Visits and Church Register, please visit their respective articles for more information.

Individuals

The Individuals mode displays basic information about every individual in your database with each individual person listed on a separate row. As such, this mode is helpful at generating quick lists and spreadsheets of personal or specific information and offers contribution statement, personal directory, and mailing label options to be printed for each individual currently visible in the view.

Clicking on an individual's name takes you to their personal profile where you can print or edit their information as needed.

Fields in this mode are specific to the individual person, not a household or giving unit and include the following:

- Name - A person's preferred (if different from their legal name) and last name on their record.
- Address - The physical address of a person's household, if available. An away address will appear instead if different from the household address.
- Age - A demographic calculated based on birth year, if applicable, that can be included with on the annual report.
- Baptism - Date of baptism, if available. Can be a partial date.
- Birthday - Date of birth, if available. Can be a partial date. A birth year is required to calculate an approximate age.
- Children - Any relationships with other person records listed as a child.
- Confirmation - Date of confirmation, if available. Can be a partial date.
- Death - Date of death, if available. Can be a partial date. A person marked as deceased will also have a Latin cross next to their name.

- Email Addresses - Any email addresses attached to the person or their household record.
- Envelope Number - An assigned number for offerings that can be shared between married couples only. A person record is not required to have an envelope number to have offerings attributed to them or to receive contribution statements.
- Ethnic Group - A demographic that can be included with on the annual report.
- Grade - The current grade of a student's school or Sunday school.
- Household - The surname of the person's household. Clicking on this field will take you to the household profile.
- Last Attended Worship - The date of the last attendance record taken for an event under the Worship calendar. Other calendar events are not included in this calculation.
- Maiden Name - A previous surname after marriage.
- Parents - Any relationships with other person records listed as a parent.
- Phone Numbers - Any phone numbers attached to the person or their household record.
- Photo - A photo of an individual on the person's profile. This is separate from the household photo.
- Received By - How a person was received as a member. The options for this field are determined by your denomination.
- Received On - When a person was received as a member. If confirmed, this date will determine gains on the annual report.
- Removed By - How a person was removed from membership. The options for this field are determined by your denomination.
- Removed On - When a person was removed from membership. If confirmed, this date will determine losses on the annual report.
- Sex - A demographic that can be included with on the annual report.
- Spouse - A relationship with another person record listed as a spouse. This relationship is required in order to have a Wedding Anniversary.
- Status - The current membership status of a person and how they are included in the annual report.
    - A baptized member is a non-removed member who is marked as having been baptized but not confirmed.
    - A confirmed member is a non-removed member who is marked as having been confirmed.
    - A nonmember is a person who has not been received as a member or a person who has been removed from membership.

- Tags - Additional designations manually added to a person's record.
- Wedding Anniversary - Date of current marriage, if available. Can be a partial date.

Household Mode

The Households mode displays information on each household, with each household listed on a separate row. Some households may share the same surname or addressee. This mode is helpful when generating mailing information based on member locations grouped by households and offers contribution statements, household directory, and mailing label options to be printed for each household currently in the view, instead of each individual.

Clicking on a household's name will take you to the household profile where you can print or edit information related to all members of the household.

Fields in this mode are more generalized to a location/address with members who live together, including:

- Family Name - The family surname of a household.
- Address - The physical address of a household, if available. A mailing address will appear instead if different from the permanent address.
- Addressee - The label name for a household. This is what will show on mailing labels generated from Households mode.
- Email Addresses - Any email addresses attached to only the household record. This does not include those on member's individual records.
- Members - List of all members of a household. Clicking on a name will take you to their individual profile.
- Phone Numbers - Any phone numbers attached to only the household record. This does not include those on member's individual records.
- Photo - A photo from the household's profile. This is separate from a photo on a person's individual record.
- Send Newsletter - A custom field available for marking households for newsletters. Can be deleted from the Custom Fields view.

Givers Mode

The Givers mode displays information about every giving unit in your database, with either an individual or married couple listed on each row.

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

Fields offered in this view help with generating lists where you want each giving couple to be merged onto the same line, such as giving lists or envelope labels, including:

- Giver Name - This field that shows the full names of each giver. If a couple is giving jointly, the second person's maiden and/or middle name may be included. Clicking on an individual's name takes you to their personal profile.
- Address - The physical address of a person's household, if available. A mailing address will appear instead if different from the permanent address.
- Envelope Number - The current number assigned to the giving unit.
- Next Envelope Number - If an envelope renumbering has been scheduled, the scheduled number will appear in this field. Otherwise, it will be the same as the current number.
- Type - Designates whether the giving unit is an individual or marriage.

Marriages Mode

The Marriages mode displays information about current marriages in your database with each couple is listed on a separate line. This can be helpful with generating anniversary lists or mailing labels for couples.

This view offers fields related to the marriage itself, along with:

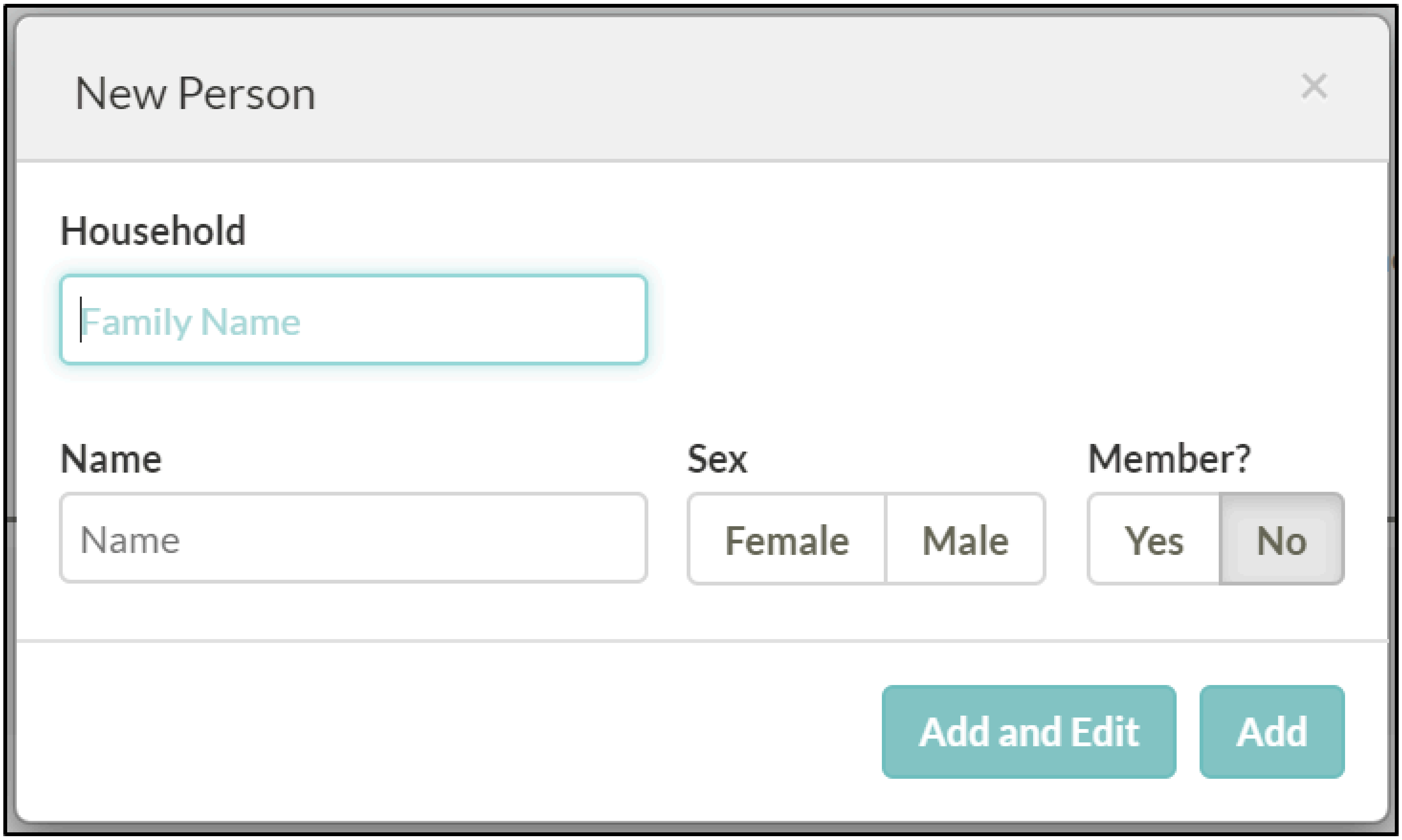
- Marriage Names - This includes the names of each person involved with the marriage. Clicking on an individual's name takes you to their personal profile
- Address - The physical address of a couple's household, if available. A mailing address will appear instead if different from the permanent address.
- Contributes Jointly - This designates if a couple will be giving offerings together. All offerings given jointly will have both person's names on the contribution statement.
- Married For - Calculated based on the marriage date and today's date.
- Wedding Anniversary - Date of the couple's marriage, if available. Can be a partial date.

Adding new People and Households

Any member, non-member, and visitor an office wants to include in Church360° Members will need to have their person records added into the database. The most straightforward way to do this would be to add a new record from the People view.

Users are able to add new people to new and existing households, including membership, personal, and contact information.

1. Go to the People view in your preferred mode.
2. Click the “New” button next to the People heading.
3. In the window that appears, start typing in a family name, or last name. Existing households will appear as you type. You can select an existing household from the drop-down menu or finish typing the person's last name and press the Enter button to add a new household.
4. Next, enter in the first name, sex (optional), and member status of the person you are adding. If the person's name is different from the family name, you can edit this information after creating their profile.
5. To finish creating the profile and return to the People view, click “Add" to create their profile.
6. To create a profile and add more information, click “Add and Edit”. The person’s household profile will open, and you will be able to continue adding and editing the information.



To add specific information to a person or household record, please visit some of our other articles:

- Updating Names
- Contact Information
- Change a person's household
- A Personal Away Address
- Personal Information
- Marriage
- Divorce
- Death
- Membership Status
- Notes
- Other Relationships
- Tags

Printing from the People View

Various reports for membership, contact, or other personal information can be compiled, organized, and communicated directly from your default People view.

For extensive reports with more than five columns selected, downloading as a CSV or Excel file is recommended.

For lists of five or fewer columns, you can also print directly from your browser.

To print a person or household list,

1. Go to to your preferred mode of the People view.
2. Choose those you are looking to include, either by checking boxes next to each name or filtering using Smart Groups, traits, or tags.
3. Use the Columns drop-down menu to the far right of the screen to choose the columns you want to include in your list. You can also click on column headers to sort your list.
4. Once your columns look appropriate, you can click the "Print" link to open a print preview where you can change your page orientation in the top-right corner before choosing to print from your browser. Depending on the number of rows chosen, printing from the browser may cause some columns to be cut off.

People Households

Christ Community Church
7/10/2020

Photo	Family Name	Address	Addressee
	Abbott	10612 Glenshire St Louis , MO 63123	The Abbott Household
	Abbott		The abbott Household
	Alexander	4027 Court Street Gray Summit, MO 63039	The Alexander Household
	Allen	1001 Rosewood Court Bakersville, MO 63027	The Allen Household
	Anderson	416 Plainfield Avenue Bakersville, MO 63027	The Anderson Household
	Banks	857 Sarah Drive Bakersville, MO 63027	The Banks Household

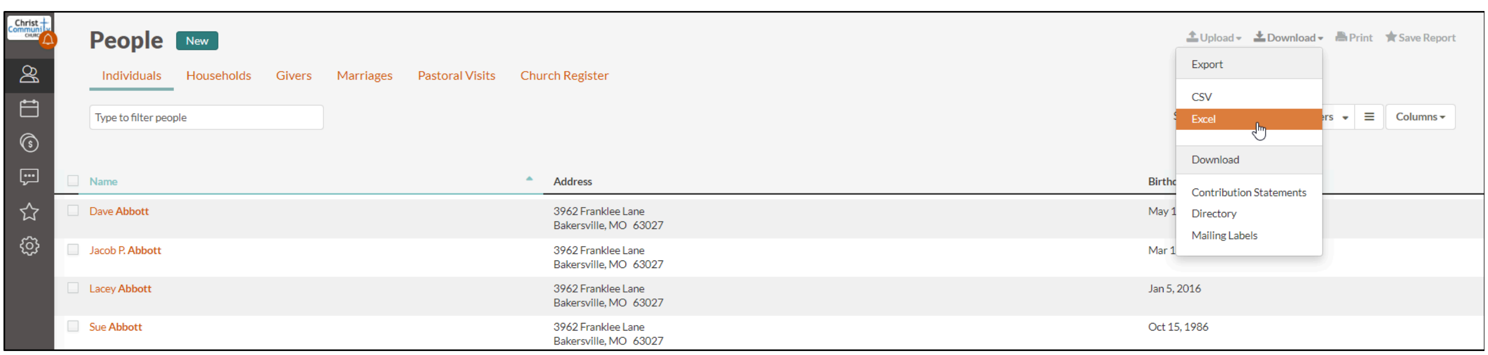
Exporting Person Lists to CSV or Excel

In Church360° Members, you can export most of your views and reports to a CSV or Excel file for easier reporting or further calculations. The default People view, in particular, can be used to download address, membership, or contact information directly to a spreadsheet format rather than from a directory.

If your report lists five or fewer columns, you can also print directly from your browser.

To export a list of people and their information,

1. Go to the People view and choose your preferred mode.
2. Filter your view as you need using the search bar, Smart Groups, or Smart Group traits.
3. Select the columns you wish to appear in your file by clicking on the "Columns" drop-down menu and checking the box for each field.
4. Click the "Download" link near the top of the view and select your preferred file type. Depending on the web browser, you may be asked if you would like to save the file to your computer. Otherwise, the download will begin automatically.
5. Once the file is downloaded to your Downloads folder, you can click on it to open it. Some browsers may have additional prompts.



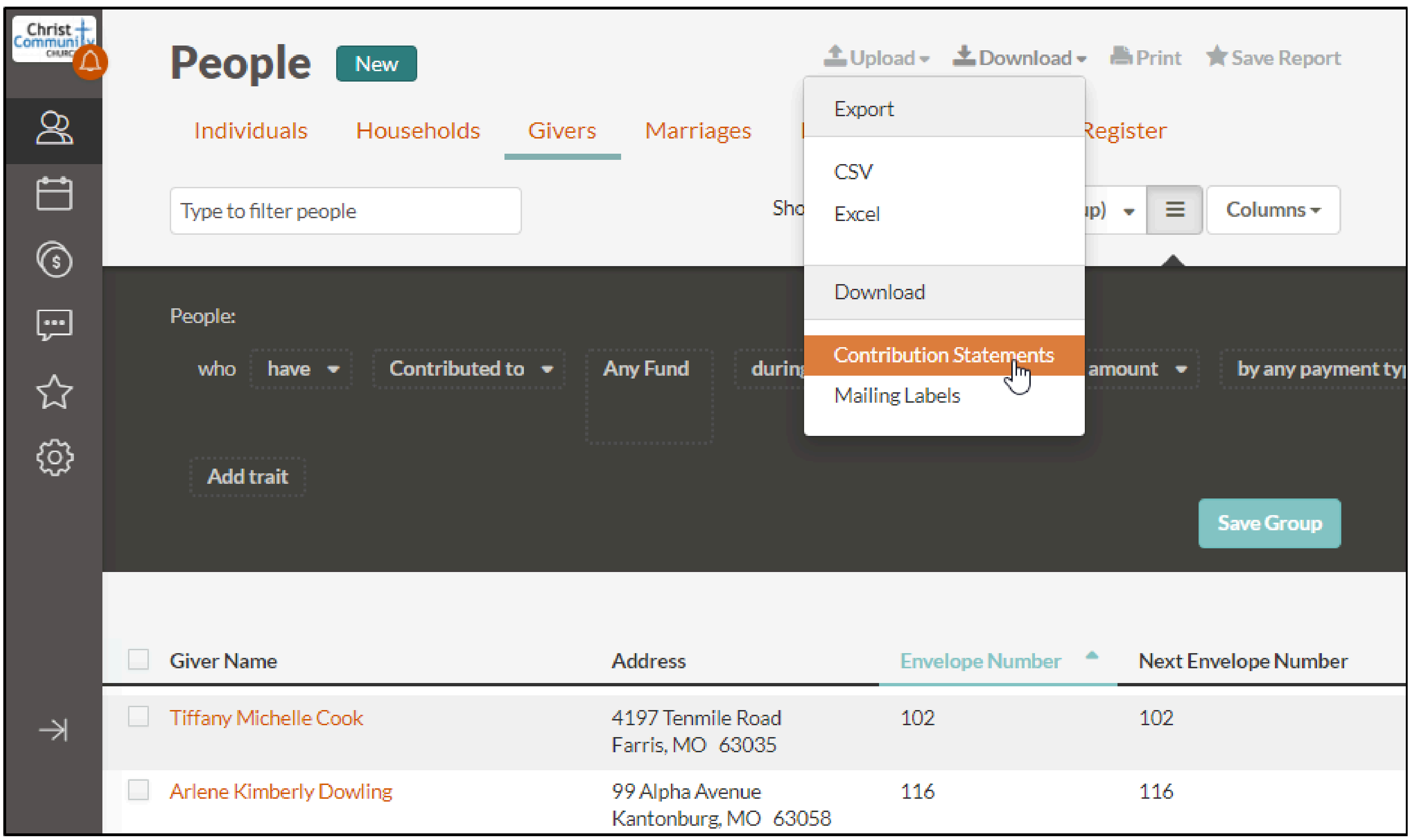
Exporting Contribution Statements to PDF

If you are looking to print a statement of offerings for any period of time in bulk, you can select the person records you want from the People view and export that information into a PDF that you can then print.

This hard copy can then be given to your congregants as a record of their charitable giving for tax deductions.

To generate a PDF statement,

1. Go to the People view in your preferred mode.
2. Choose who you are looking to print statements for, either by checking boxes next to each name or filtering using Smart Groups, traits, or tags.
3. Click the "Download" button at the top right of the screen and select "Contribution Statements".

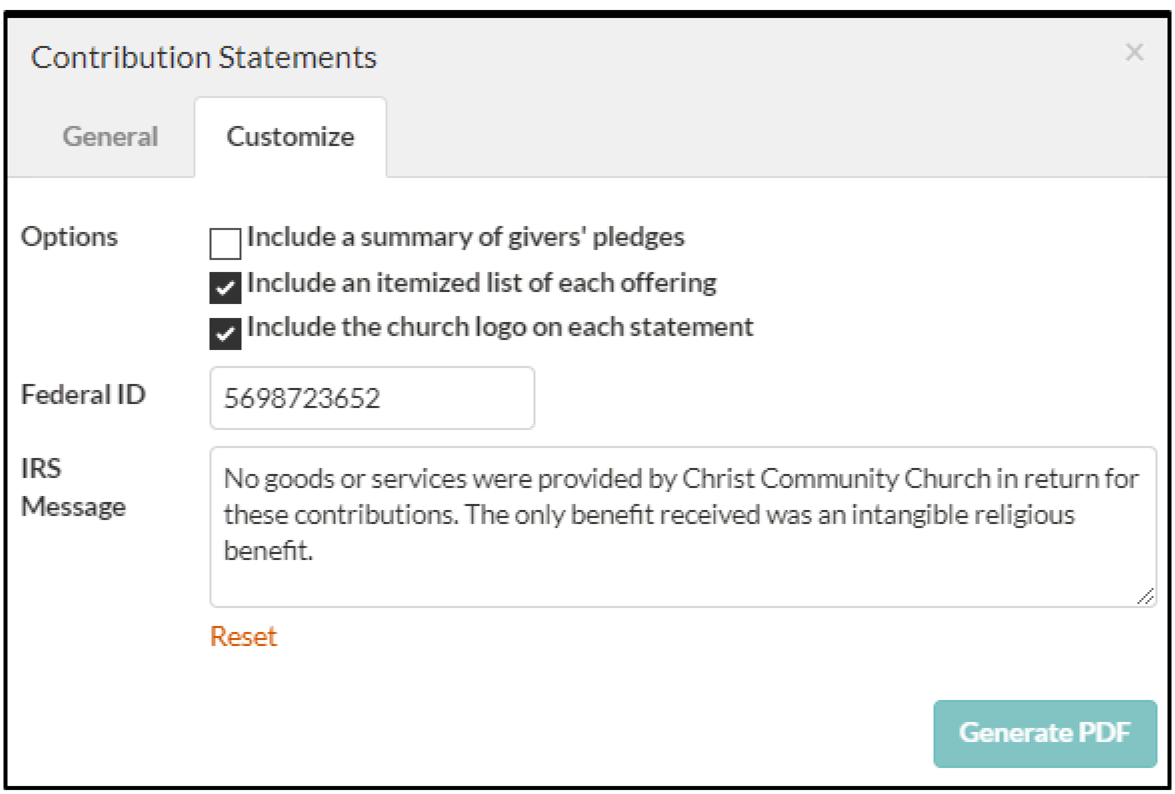


4. A pop-up window will appear with the rest of the screen greyed out behind it. There will be two tabs for this window. On the General tab, select the date range for your statements. Two shortcut links below

the fields allow you to select the entirety of the previous year or the current range for this year (from January 1st to today's date).

5. Check the box if you want to generate statements for those in your selection that did not give during the date range.

6. If this is the first time generating your statements, it's recommended that you take a look at the Customize tab before clicking the "Review and Email" button. Under the Customize tab, check whether you want to include a summary of the giver's pledges and/or an itemized list for each offering. Here, you can also add a Federal ID and an IRS message to add to each statement.



7. If all of your settings are the way you prefer, click "Generate PDF". This will prepare a PDF of all selected givers and their contribution statements. This process may take a few minutes, depending on the number of people selected.

8. Once the button changes to "Download", you can click on it to open the PDF. In the top right corner of the PDF viewer, you can click the down arrow icon to download the PDF to your computer or the printer icon to print directly from your browser.

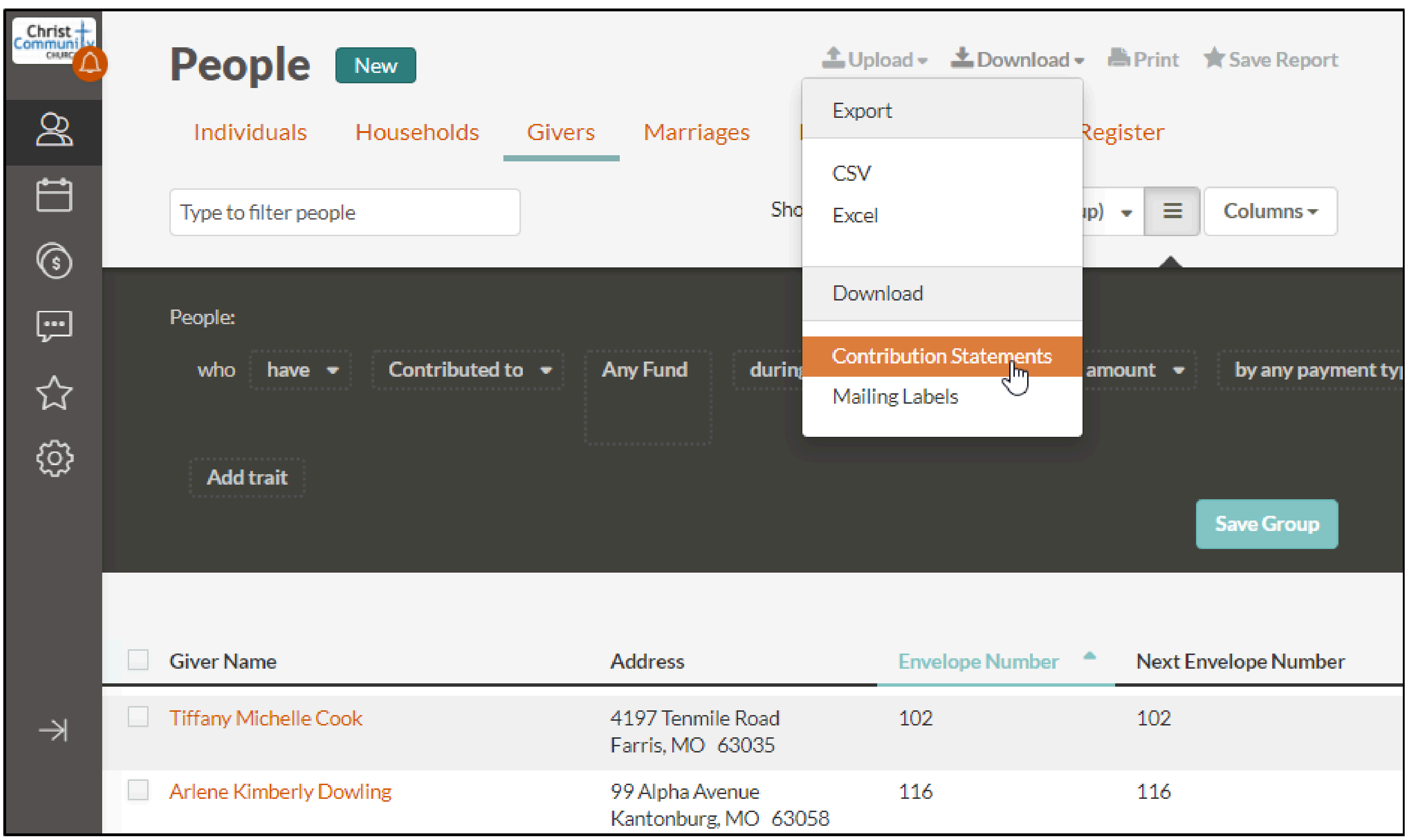
Emailing Contribution Statements

If you have a giver's email address and they don't want to paper copy of their statement, you can email their statement directly from your People view using the default email settings on your computer and internet browser.

For more information on setting up your email client to use the Church360° relay, please visit our article on the subject.

To email a PDF statement,

1. Go to the People view in your preferred mode.
2. Choose who you are looking to print statements for, either by checking boxes next to each name or filtering using Smart Groups, traits, or tags.
3. Click the "Download" button at the top right of the screen and select "Contribution Statements".

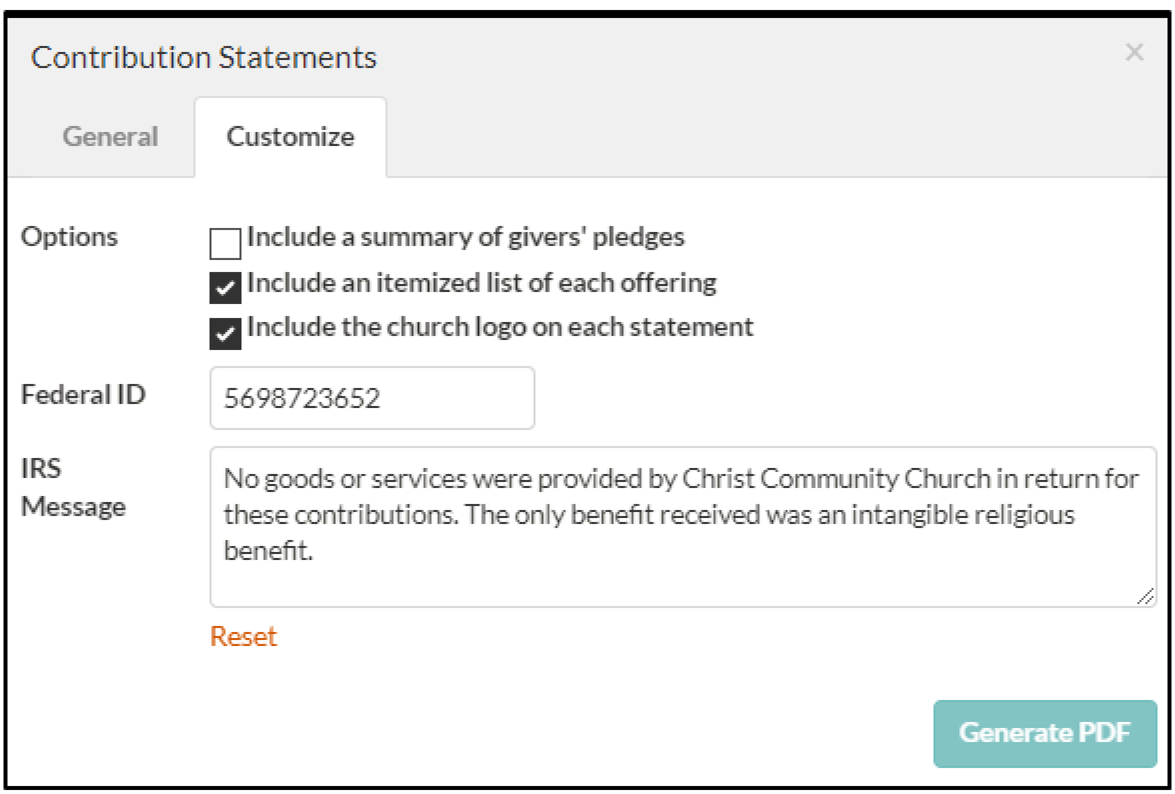


4. A pop-up window will appear with the rest of the screen greyed out behind it. There will be two tabs for this window. On the General tab, select the date range for your statements. Two shortcut links below

the fields allow you to select the entirety of the previous year or the current range for this year (from January 1st to today's date).

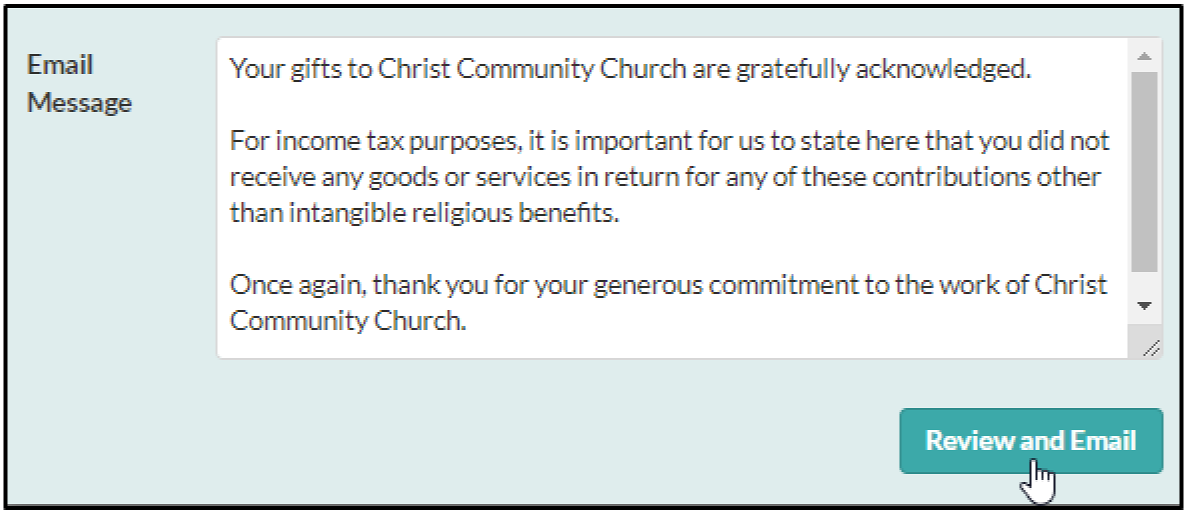
5. Check the box if you want to generate statements for those in your selection that did not give during the date range.

6. If this is the first time generating your statements, it's recommended that you take a look at the Customize tab before clicking the "Review and Email" button. Under the Customize tab, check whether you want to include a summary of the giver's pledges and/or an itemized list for each offering. Here, you can also add a Federal ID and an IRS message to add to each statement.



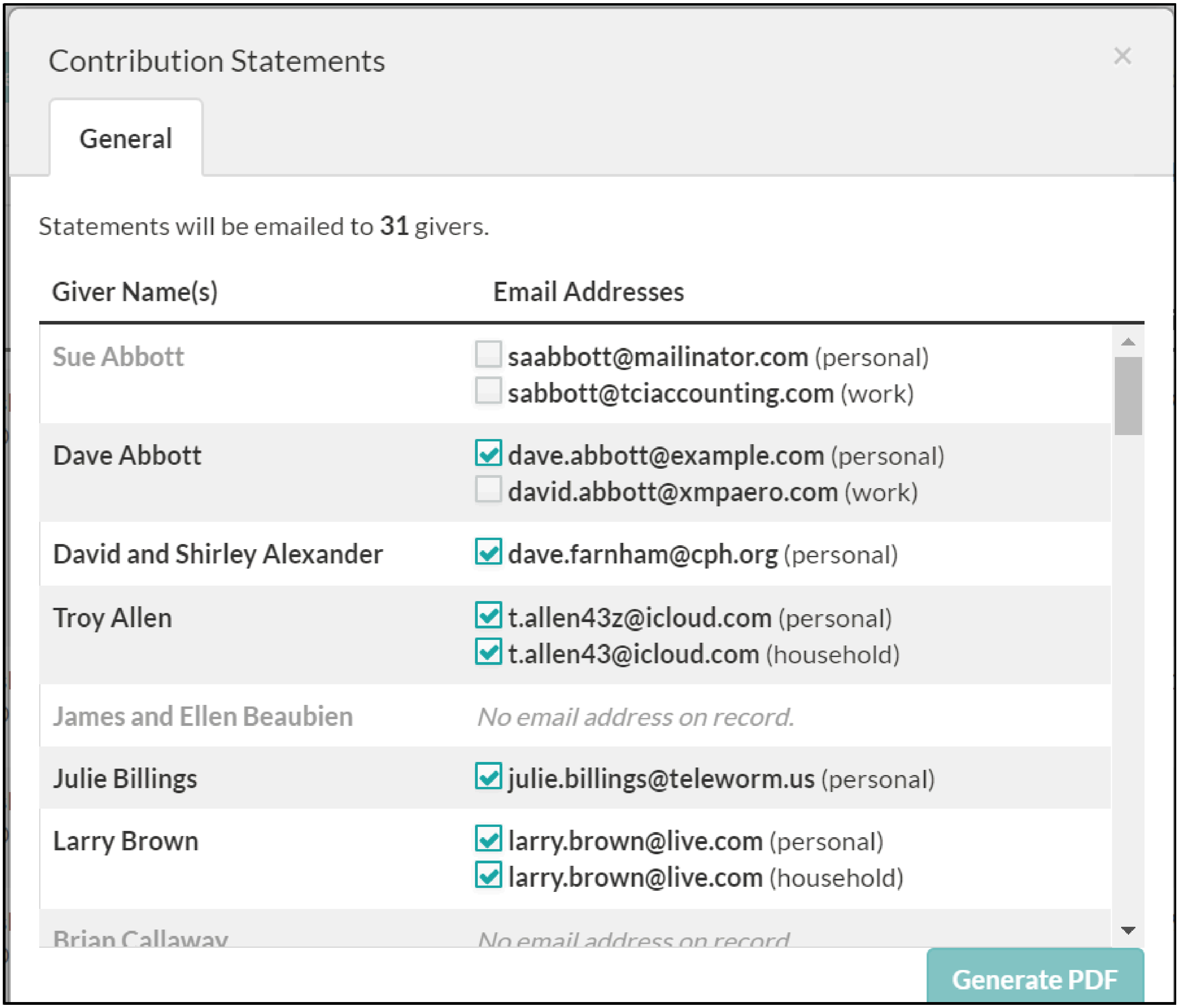
7. In the lower section of the window, you can type an email message to be sent with each statement.

8. If all of your settings are the way you prefer, click "Review and Email". You do not have to click the "Generate PDF" if you are not planning on downloading or printing these statements.



9. When choosing to email statements, you'll be shown a window with all available email addresses for those in your selection. You can check which addresses you would like to receive their respective statements. The addresses you checked will be saved and selected for the next time you send an email.

10. Click "Send" to send those contribution statements to those emails. A notification will appear under the bell icon in the upper right corner of your screen.

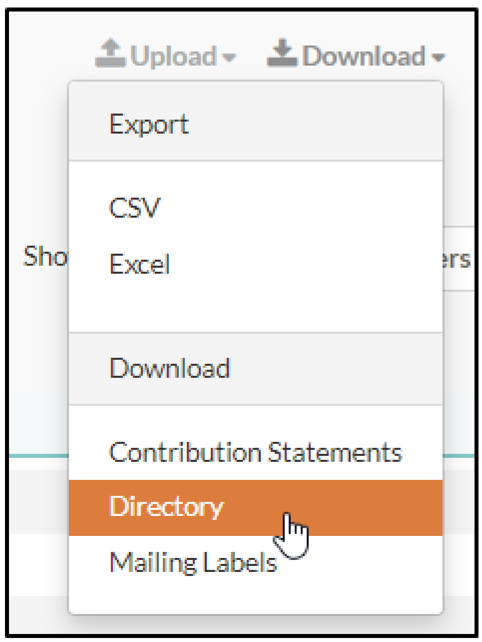

Contribution Statements
General
Statements will be emailed to 31 givers.
Giver Name(s)
Email Addresses
Sue Abbott
saabbott@mailinator.com (personal)
sabbott@tciaccounting.com (work)
Dave Abbott
dave.abbott@example.com (personal)
david.abbott@xmpaero.com (work)
David and Shirley Alexander
dave.farnham@cph.org (personal)
Troy Allen
t.allen43z@icloud.com (personal)
t.allen43@icloud.com (household)
James and Ellen Beaubien
No email address on record.
Julie Billings
julie.billings@teleworm.us (personal)
Larry Brown
larry.brown@live.com (personal)
larry.brown@live.com (household)
Generate PDF

Exporting a Church Directory

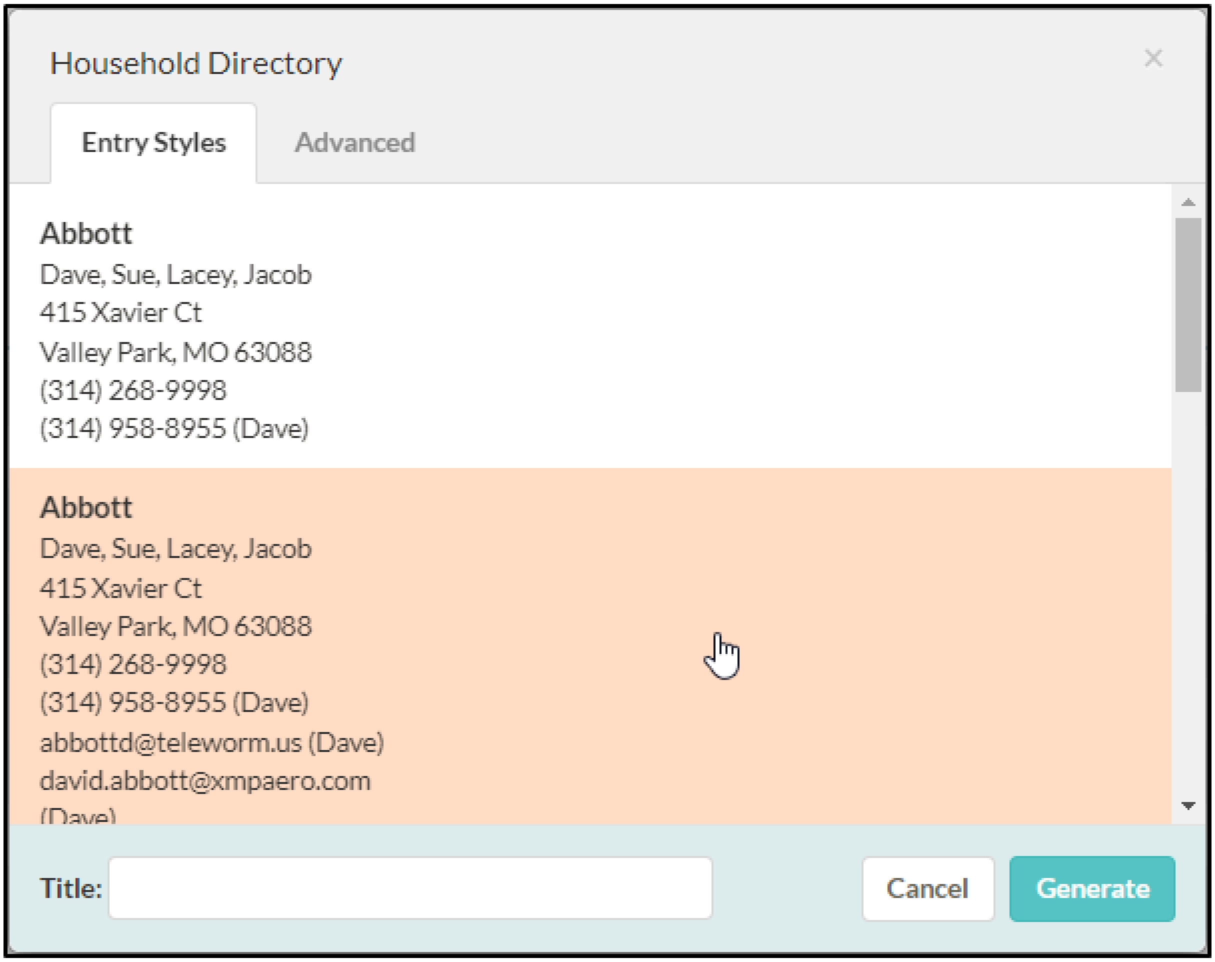
A common report users may want to export is an individual or household directory. For those who have also added images to either individual or household profiles, a pictorial directory can be exported as well.

To generate a directory,

1. Go to the People view and select either the Individuals or Households mode. The mode you choose will determine the type of directory you'll generate.
2. Select those you want to include in the directory, either by checking boxes next to each name or filtering using Smart Groups, traits, or tags. If checkboxes are marked, all visible records will be downloaded.
3. Click the "Download" button at the top right of the screen and select "Directory".



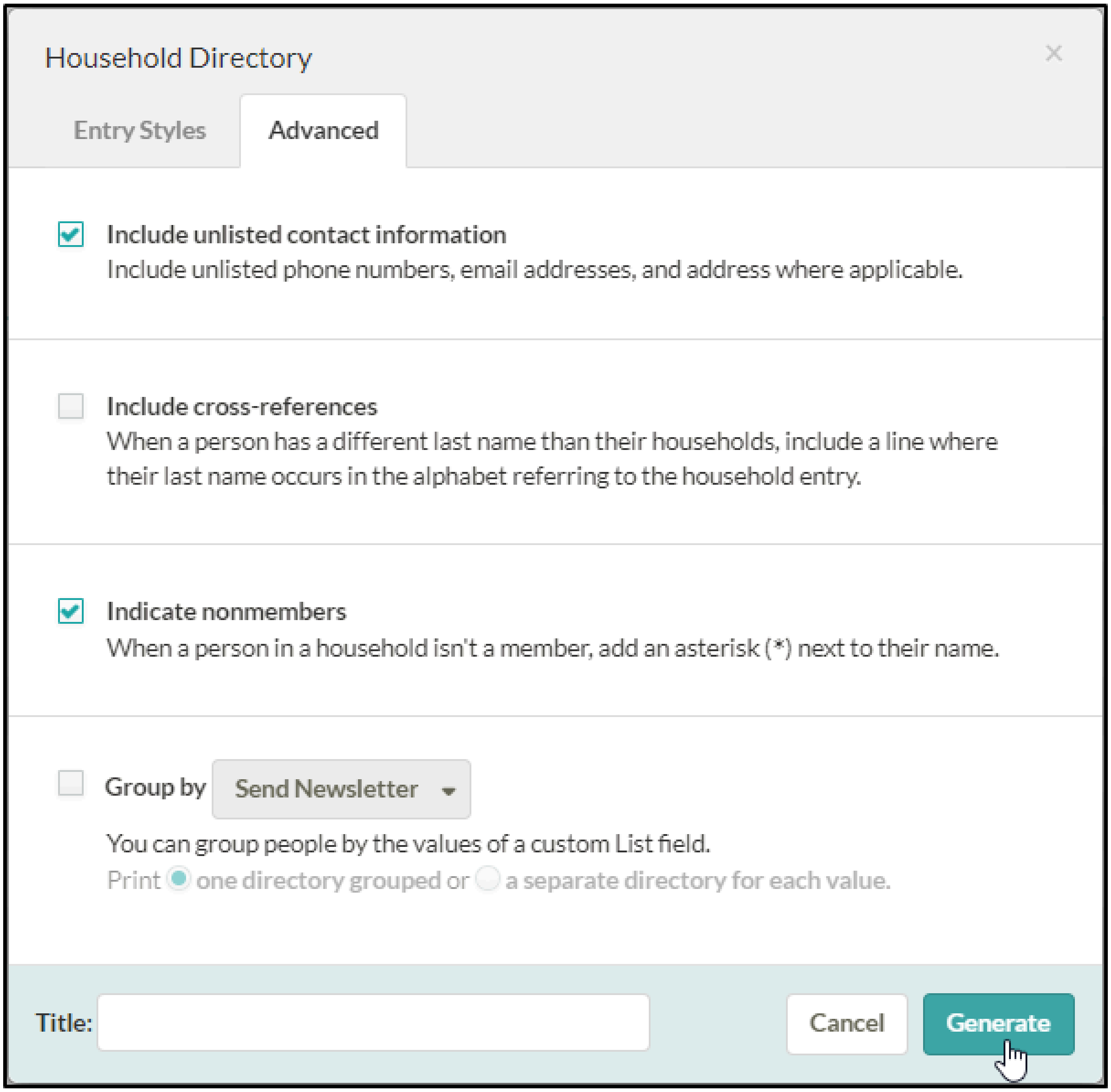
4. A pop-up window will appear with the rest of the screen greyed out behind it. There will be two tabs for this window. On the Entry Styles tab, scroll through the samples and choose how you'd like a directory entry to look.



5. If this is the first time generating a directory, it's recommended that you take a look at the Advanced tab before clicking the "Generate" button. Under the Advanced tab, your choices will vary depending on which mode you are generating from.

- If you are using the Individuals view, check if you want to include unlisted contact information. You can also choose to group your people according to a custom Person field, if available.
- If you are using the Households view, check if you want to include unlisted contact information, cross-references (for those with surnames differing from their household name), or if you'd like non-members to be shown with an asterisk. You can also choose to group your people according to a custom Household field, if available.

6. If all of your settings are the way you prefer, you can add a title and click "Generate". This will prepare a Word document of your directory. This process may take a few minutes, depending on the number of people selected.



7. Once the button changes to "Download", you can click on it to download the Docx file. Click on the file in your Downloads folder to open it up for editing or printing.

Exporting Individual Mailing Labels

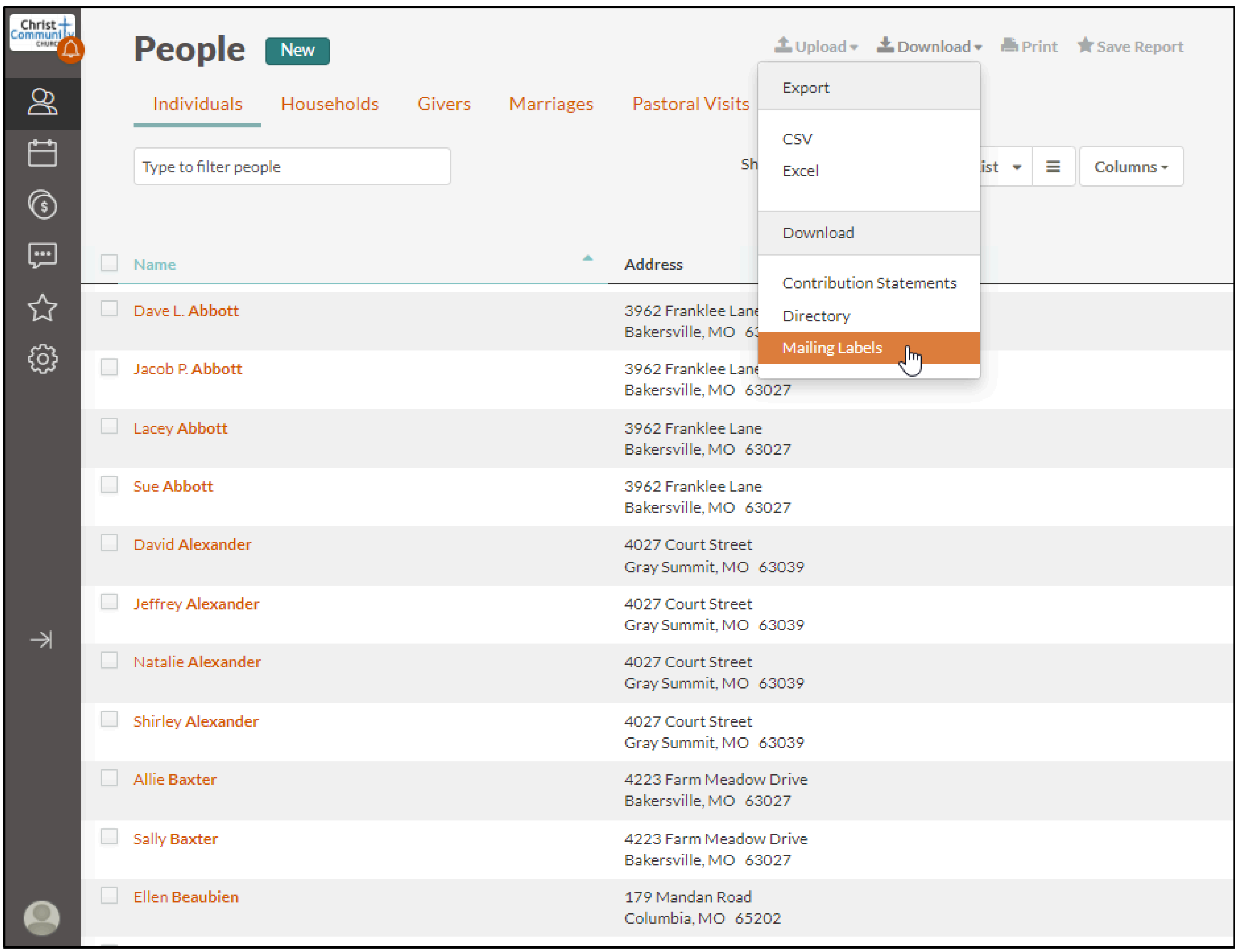
For some tasks, you'll want to export mailing labels for specific people, instead of an entire household.

To generate mailing labels for individuals,

1. Go to the People view in the Individuals mode.

2. Choose who you are looking to include, either by checking boxes next to each name or filtering using Smart Groups, traits, or tags.

3. Click the "Download" button at the top right of the screen and select "Mailing Labels".

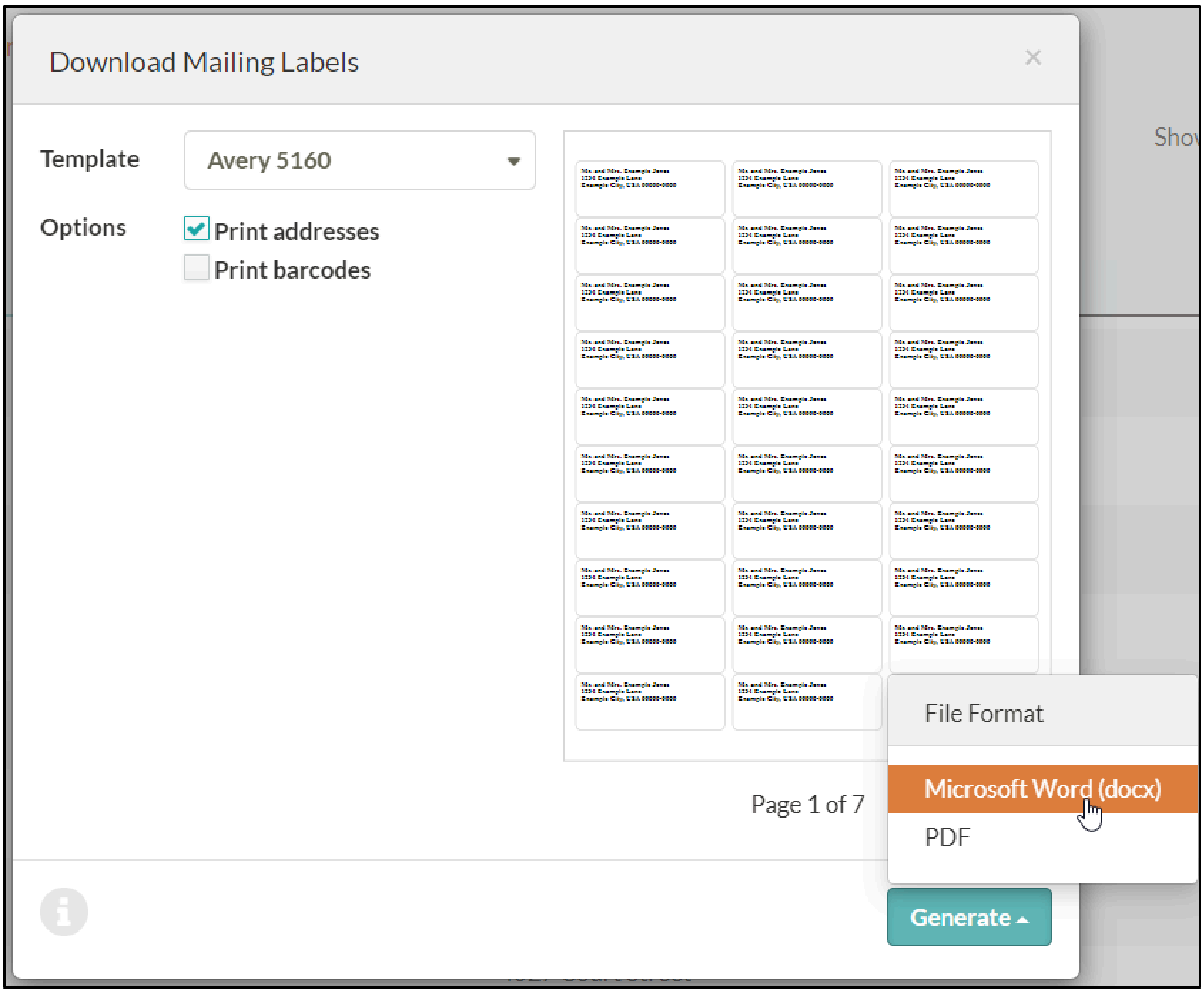


4. A pop-up window will appear with the rest of the screen greyed out behind it. Select the template that best matches your label sheet using the drop-down menu.

5. Use the checkboxes to choose whether you'd like to include addresses or barcodes. For more information on barcodes, please visit our article on the topic.

6. Once all of your settings are set, you can click "Generate" and choose whether you'd like to download your labels in PDF or Word format. This process may take a few minutes, depending on the number of people selected.

7. Once the button changes to "Download", you can click on it to download the file. Click on the file in your Downloads folder to open it up for editing or printing.

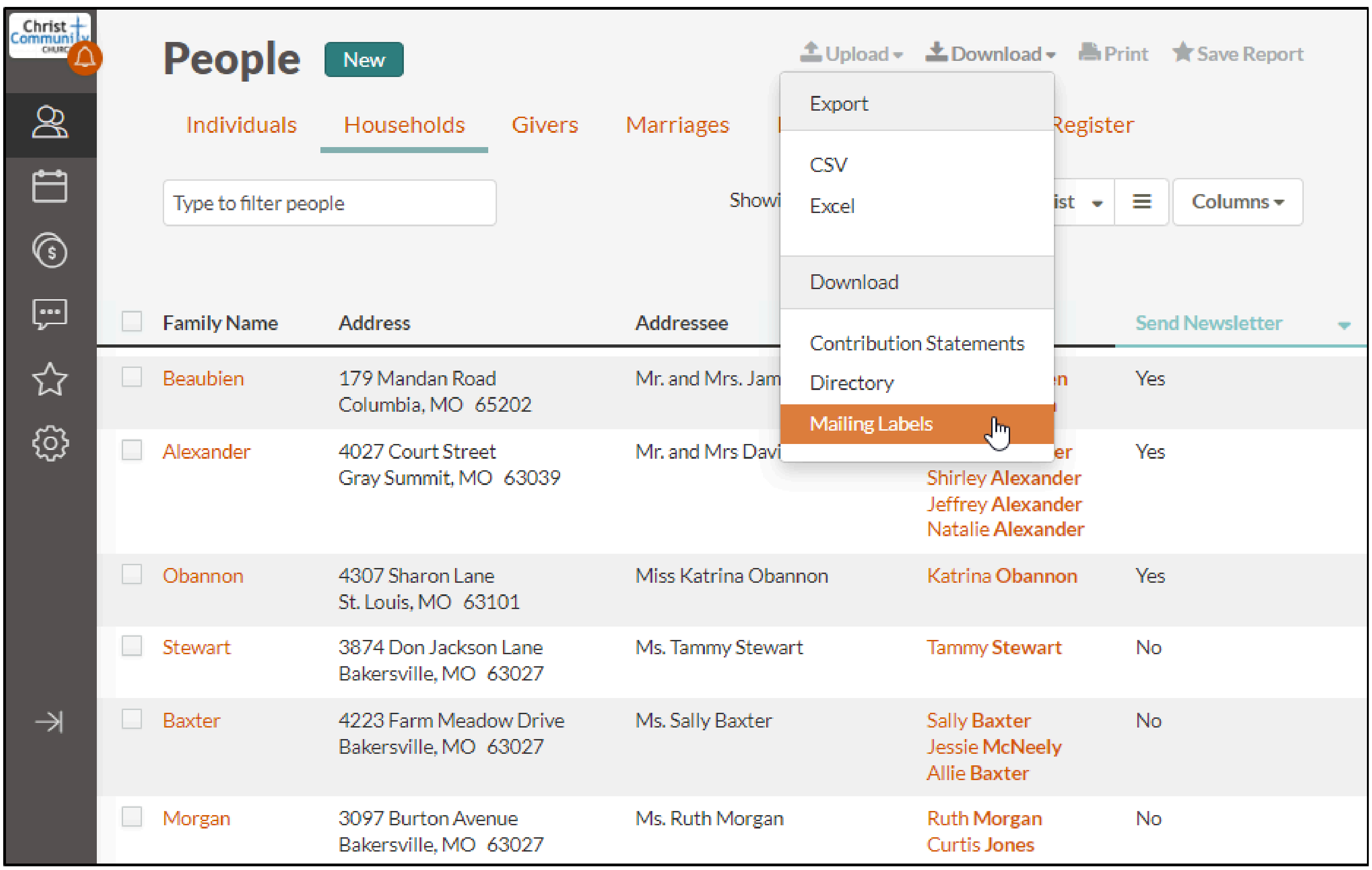


Exporting Household Mailing Labels

If you are looking to print one mailing label per household, it's recommended to generate by household, instead of for individuals. These labels will use the Addressee field of the household record for labels.

To generate mailing labels for households,

1. Go to the People view in the Households mode.
2. Choose the households you are looking to include, either by checking boxes next to each name or filtering using Smart Groups, traits, or tags. Households will be included if at least one member fulfills your set criteria.
3. Click the "Download" button at the top right of the screen and select "Mailing Labels".

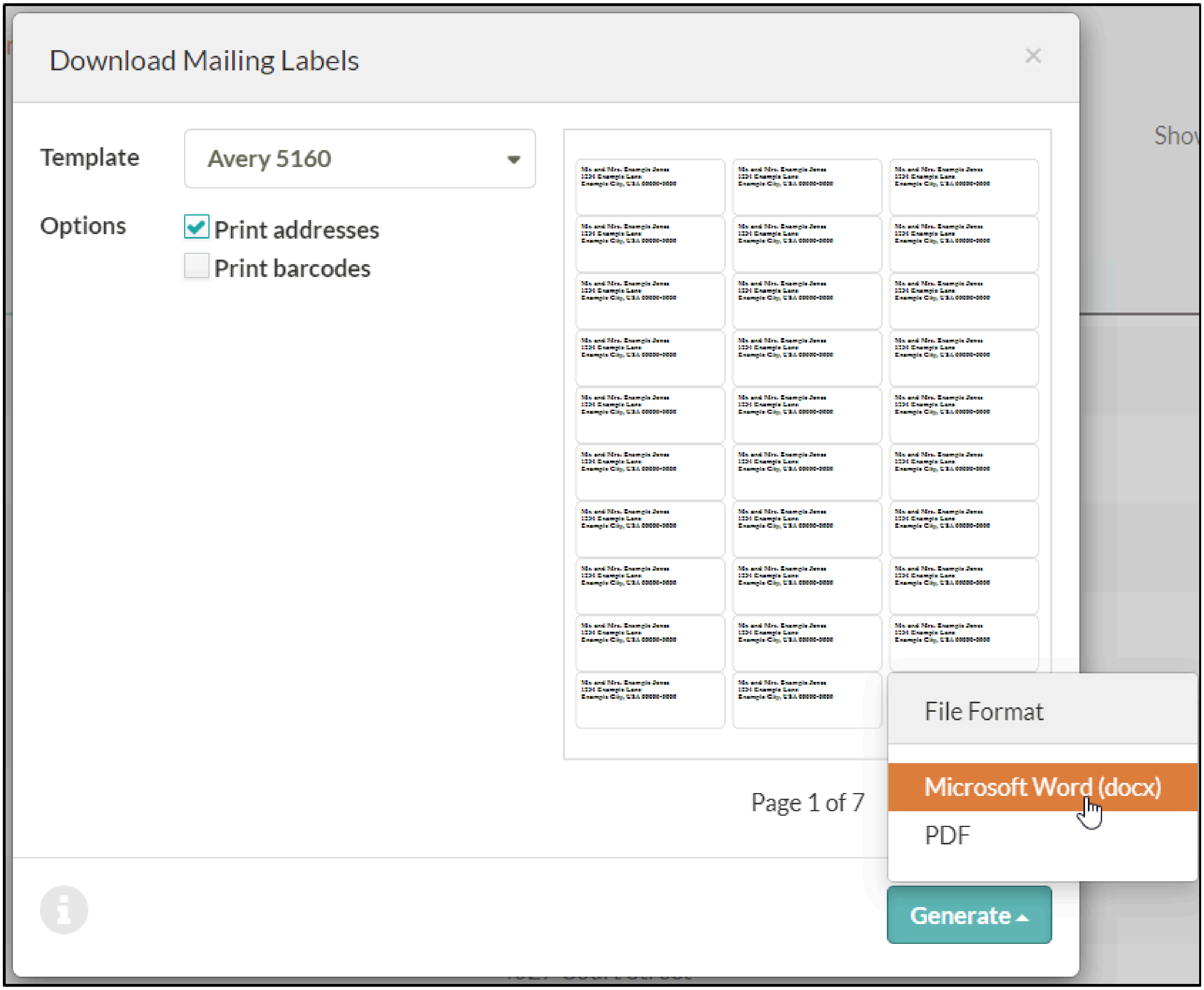


4. A pop-up window will appear with the rest of the screen greyed out behind it. Select the template that best matches your label sheet using the drop-down menu.

5. Use the checkboxes to choose whether you'd like to include addresses or barcodes. For more information on barcodes, please visit our article on the topic.

6. Once all of your settings are set, you can click "Generate" and choose whether you'd like to download your labels in PDF or Word format. This process may take a few minutes, depending on the number of households selected.

7. Once the button changes to "Download", you can click on it to download the file. Click on the file in your Downloads folder to open it up for editing or printing.

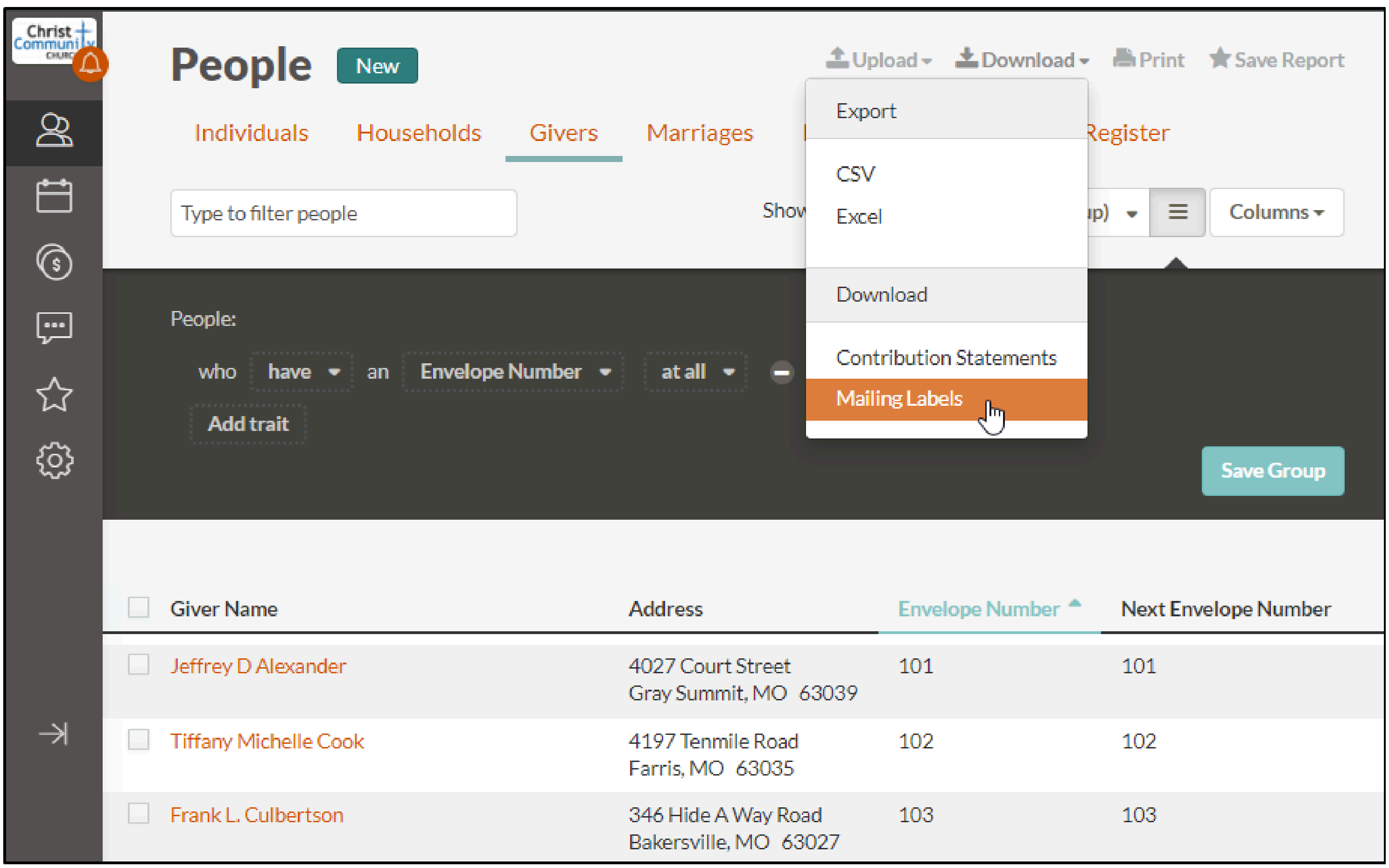


Exporting Envelope Labels

If you are looking to print envelope labels, you can do so from the Givers mode of the People view. These labels will use the Giver Name field.

To generate labels for envelopes,

1. Go to the Givers mode in the People view.
2. Choose the givers you are looking to include, either by checking boxes next to each name or filtering using Smart Groups, traits, or tags. If using envelope numbers, you may want to filter only those with an Envelope number or a Next Envelope Number (if you've scheduled an envelope renumbering).
3. Click the "Download" button at the top right of the screen and select "Mailing Labels".



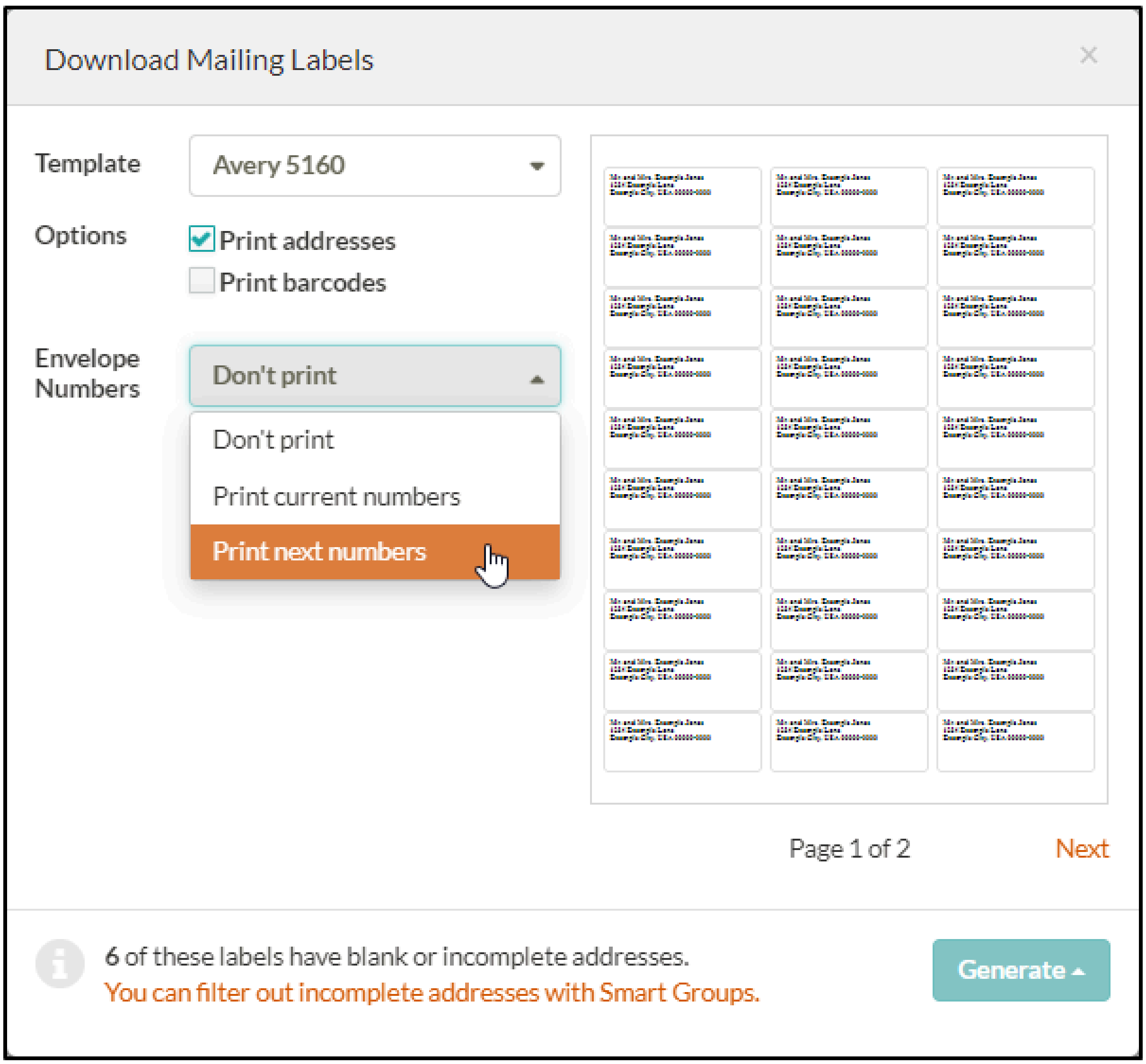
4. A pop-up window will appear with the rest of the screen greyed out behind it. Select the template that best matches your label sheet using the drop-down menu.

5. Use the checkboxes to choose whether you'd like to include addresses or barcodes. For more information on barcodes, please visit our article on the topic.

6. To add envelope numbers to your labels, use the drop-down to choose to not print, print current numbers, or print next numbers (if a renumbering has been scheduled).

7. Once all of your settings are set, you can click "Generate" and choose whether you'd like to download your labels in PDF or Word format. This process may take a few minutes, depending on the number of households selected.

8. Once the button changes to "Download", you can click on it to download the file. Click on the file in your Downloads folder to open it up for editing or printing.



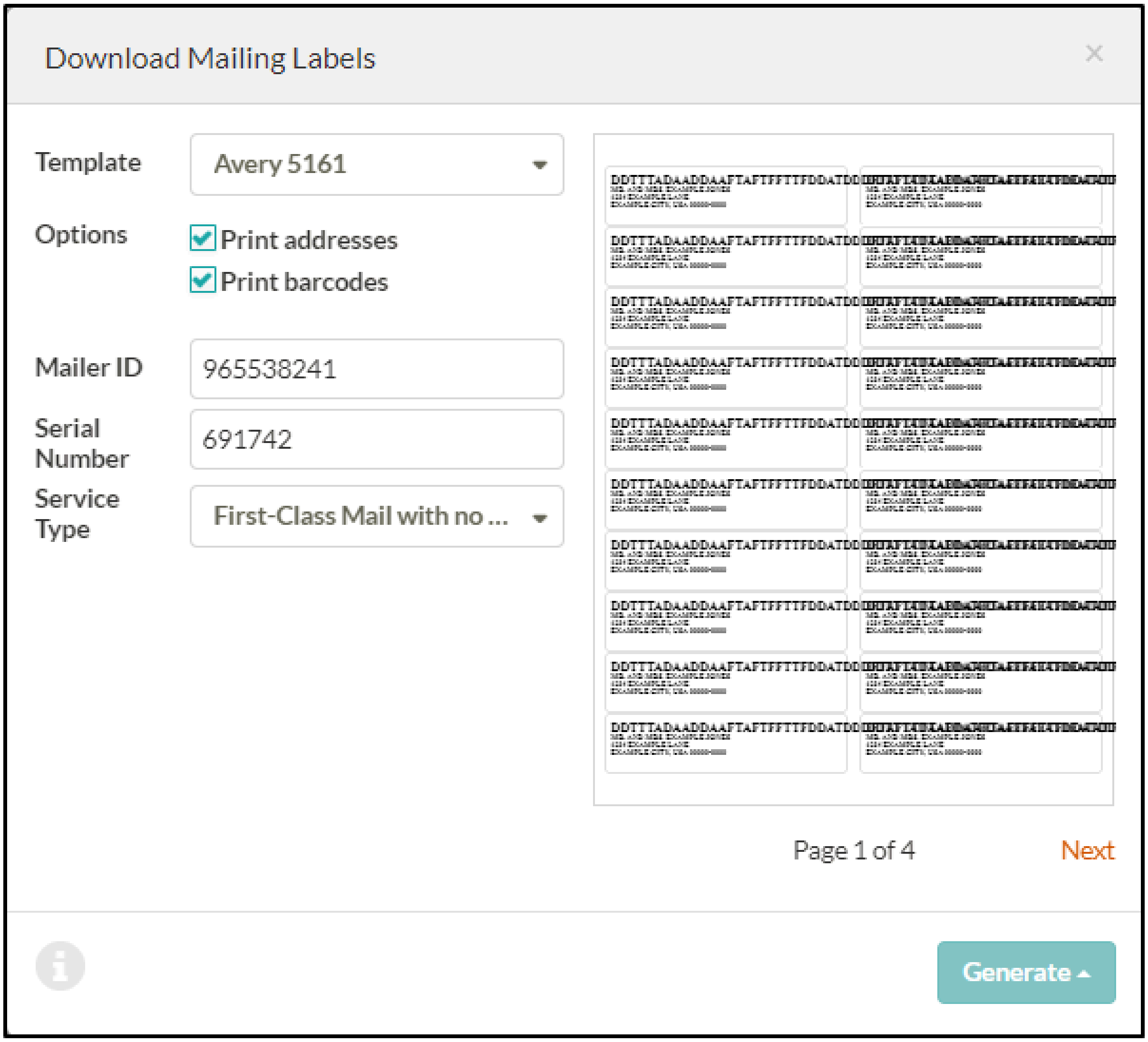
Using Barcodes on Mailing Labels

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

To utilize this feature, you'll first need to contact your local post office for a Mailer ID, Serial Number, and Service type for USPS Intelligent Mail barcodes. For more information on IMb, please visit the Postal Pro website here.

To generate mailing labels with barcodes,

1. Once you've filtered or selected people to generate labels for, click the "Download" button and select the "Mailing Labels" option.
2. A pop-up window will appear with the rest of the screen greyed out behind it. Select the template that best matches your label sheet using the drop-down menu. It's important to note that some label templates do not support IMb.
3. Use the checkboxes to choose to include barcodes.
4. In the fields that appear, enter the Mailer ID and Serial Number provided to you by your post office. Use the drop-down menu to choose the Service Type for your barcodes.
5. Next to the “Generate” button, you may see a message prompting you to install the USPS Intelligent Mail barcode font. Click on the hyperlink and the file will automatically begin downloading in your browser.
6. In your Downloads folder, click the file to open it and begin installing the font.
7. Within the file, click on the “Install” button and follow the instructions as prompted. You will only need to install the font on your computer one time and it will apply to any subsequent mailing label exports. If you are not a system administrator, you may need special permission to download and run this font.
8. Once your settings are set and fonts installed, you can now click "Generate" and choose whether you'd like to download your labels in PDF or Word format. This process may take a few minutes, depending on the number of people selected.
9. Once the button changes to "Download", you can click on it to download the file. Click on the file in your Downloads folder to open it up for editing or printing.


Download Mailing Labels
×
Template
Avery 5161
Options
Print addresses
Print barcodes
Mailer ID
965538241
Serial Number
691742
Service Type
First-Class Mail with no ...
Page 1 of 4
Next
Generate

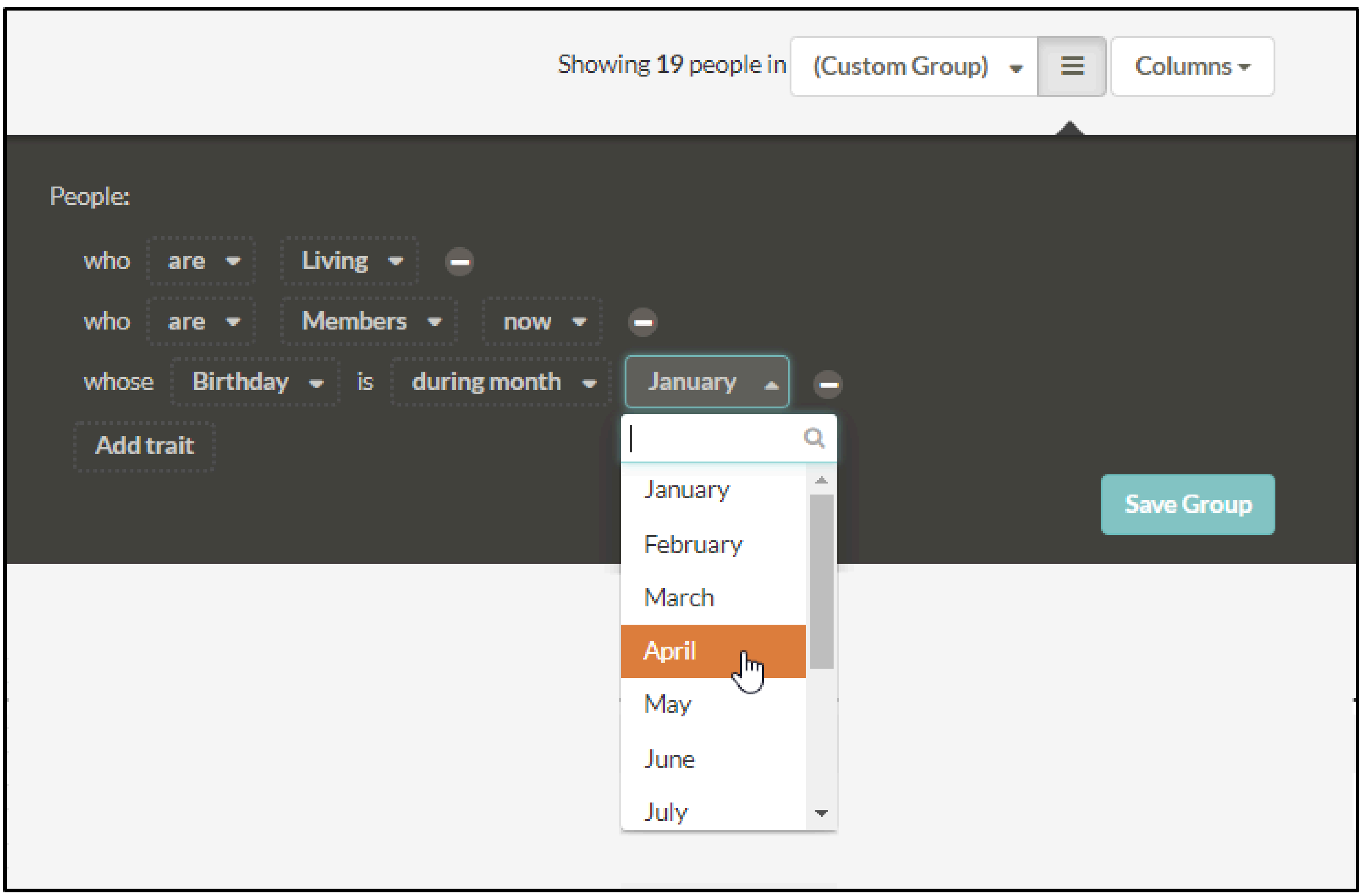
Saving Reports

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

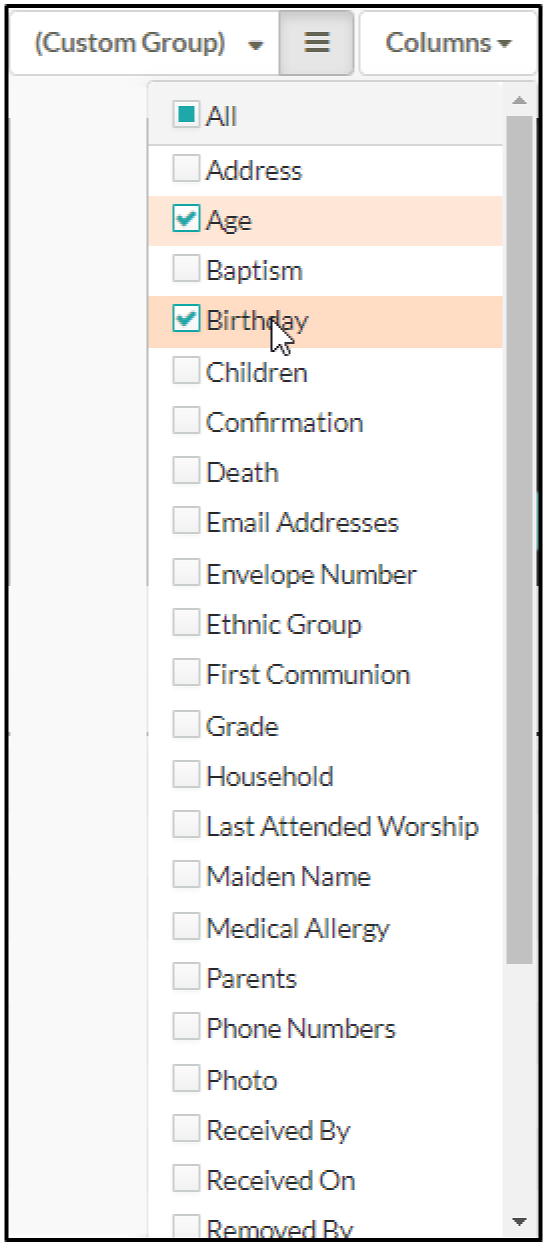
To create and save a report,

1. Go to a view you are looking to create a report on, such as People, Attendance, or Offerings.

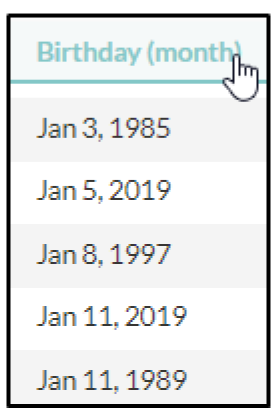
2. Filter your list as you need using the search bar, Smart Groups, or Smart Group traits.



3. Use the Columns drop-down menu to the far right of the screen to choose the columns you want to include in your list.



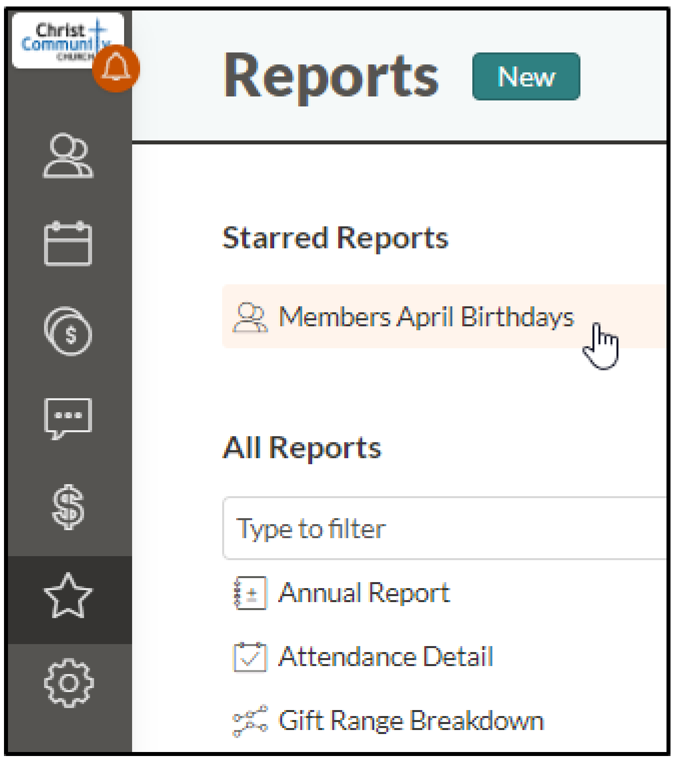
You can also click on column headers to sort your list.



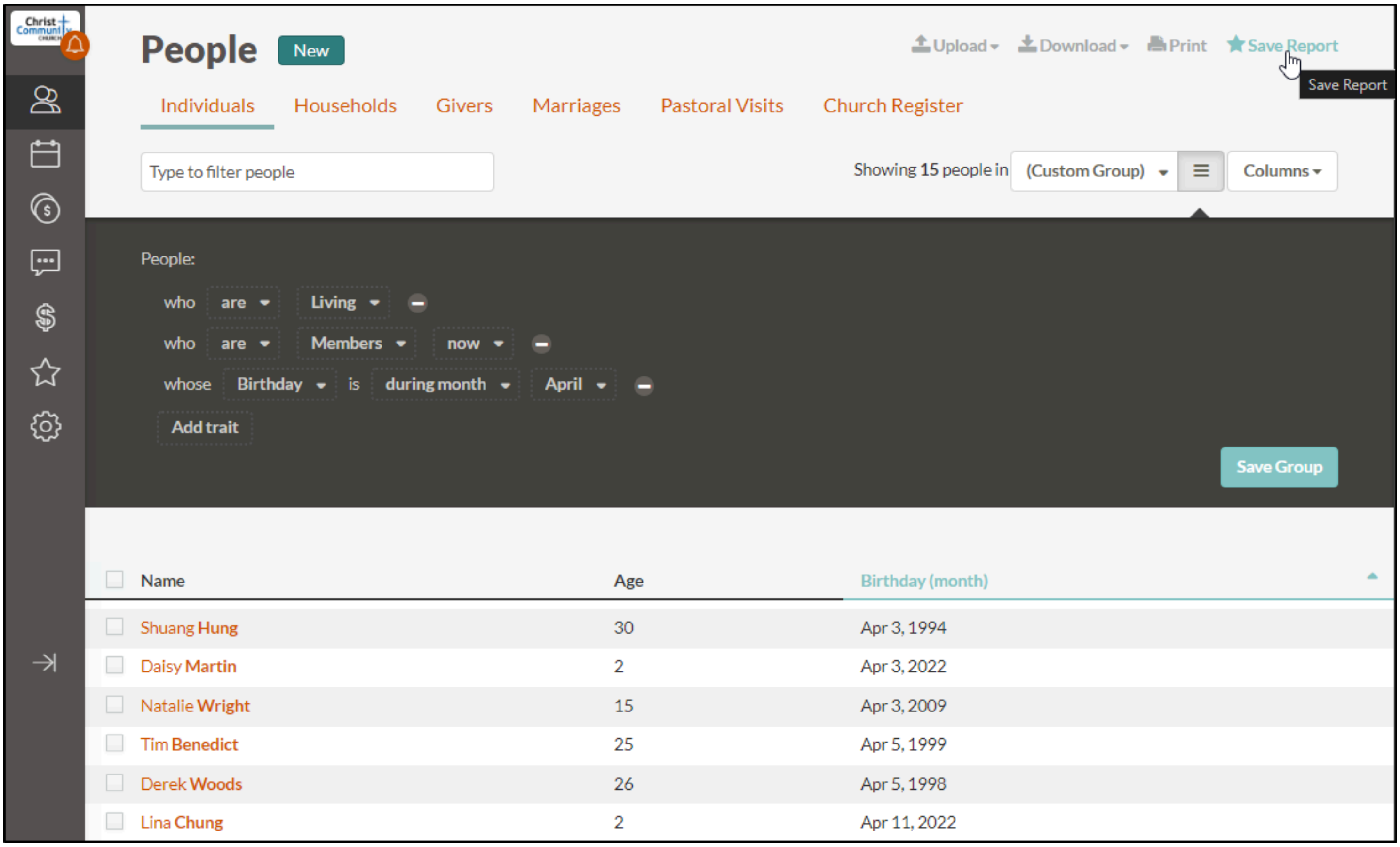
4. Once your report looks appropriate, you can click the Save Report link to the far right of the view.

5. Enter a title for your report and click the "Save" button to save your settings.

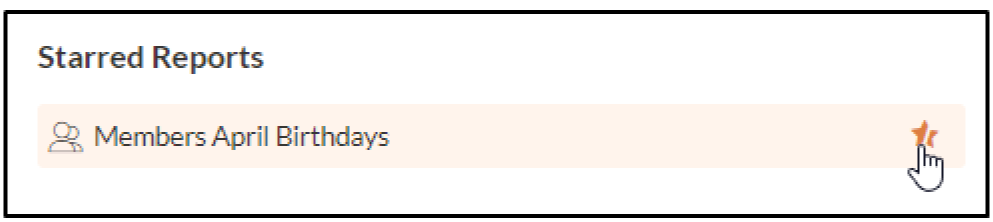
6. After saving, you can access your saved reports by going up to the Reports view and looking under the Starred Reports section. Your reports will only be seen by you, no other logins will have access to them.



7. If you need to edit your report, click the report's name under Starred Reports to be taken to the view. Add any changes for your report and click Save Report. In the pop-up, you can choose to save the changes to your report, or create a new report with the new settings.



If you no longer need a report or want to delete it, go to the Reports view and click the star icon to the right of the report to remove it permanently.



Bulk Archiving

Over time, with people coming and going through your church's doors, your database will distinctly grow. And you may want to clean up records that haven't been used in years.

For a single record that is unneeded for any reporting, you can open the record and archive it manually.

If you have multiple records you need to archive, Church360° Members offers an easy bulk archiving utility on your People: Individuals view.

When archiving a person record, you are placing them in a special section of Church360° Members that allows you to exclude them from all reports but still retain them in most membership, attendance, and offering figures.

It is not recommended to archive people you may need to report on later for any reason and a good rule of thumb is to keep removed or deceased members for at least five years. Though unarchiving is available, as the database changes over time, it may become increasingly difficult to reintegrate their record into the updated interface.

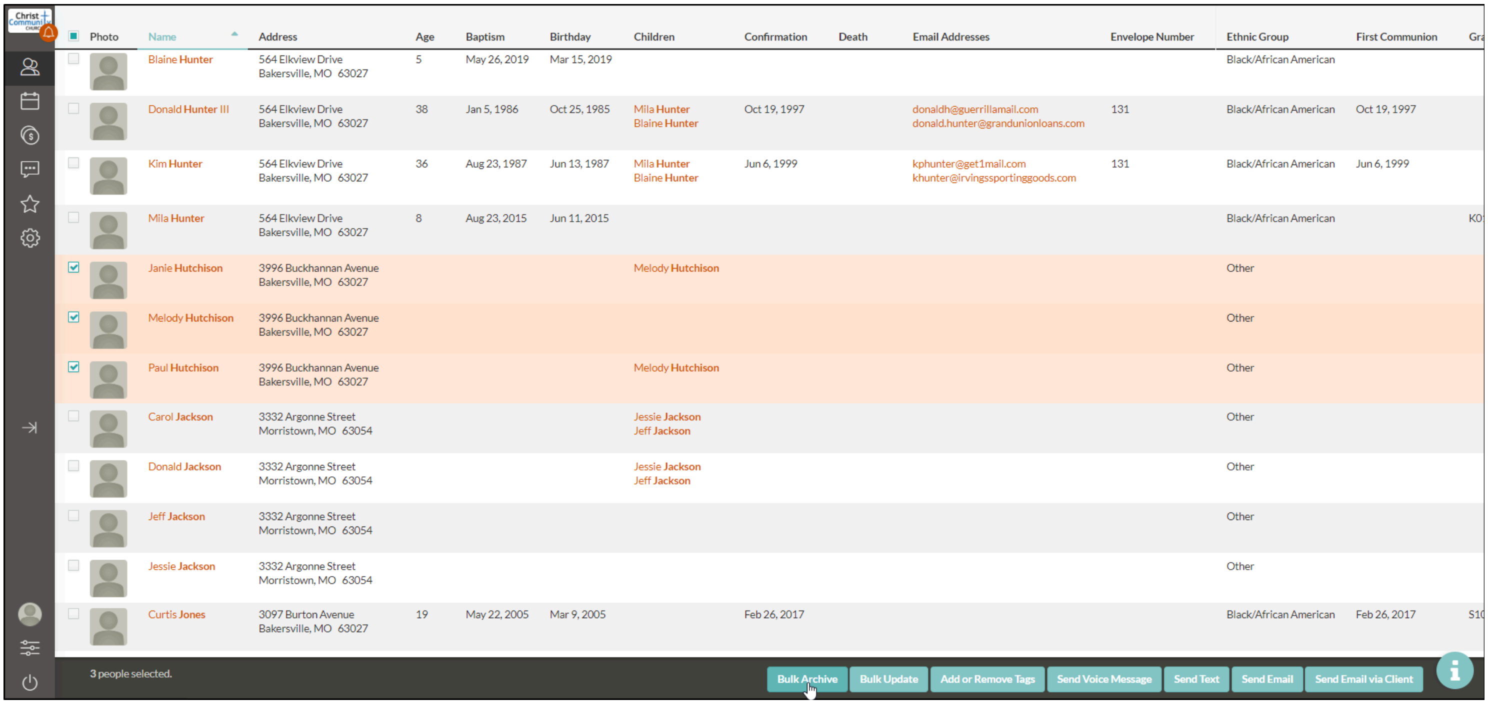
If a person is giving jointly and is archived, the giving unit is severed and the remaining spouse will contribute separately from that time forward. If the person is unarchived, they will need to be marked as contributing jointly with their spouse again as well as reassigned their envelope. This will be true even if the other spouse was archived as well.

Due to deletion being a permanent process that cannot be undone, there is no bulk deleting feature.

To use the bulk archiving feature,

1. Go to the People view and select the Individuals mode. This utility is not available for any other mode.
2. Select those you want to archive, either by checking boxes next to each name or filtering using Smart Groups, traits, or tags. If filtering you will want to click the topmost checkbox to select all visible records.
3. Once the desired records have been checked, a black bar will appear at the bottom of the screen. Click the first button that's labeled "Bulk Archive".
4. A pop-up window will appear with the rest of the screen greyed out behind it. This window will tell you how many people are selected to be archived as well as any person records with a Members or Unite

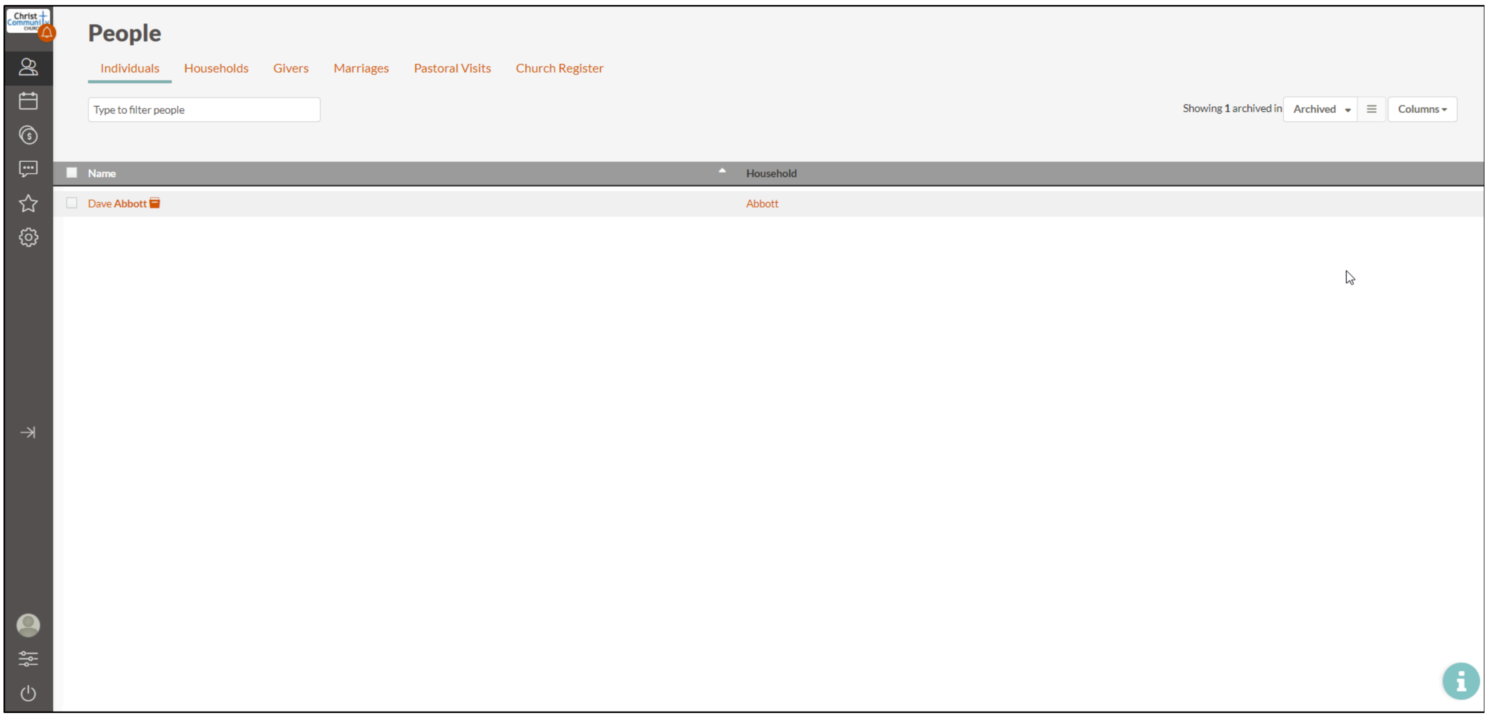
login assigned. The warnings will reiterate that joint giving, attendance records, offering records, and other membership information may become unavailable when archiving the chosen records.



Accessing the Archived View

Whether to retrieve a record removed accidentally or to completely delete a duplicate record, you can access your archived records from your People view at any time.

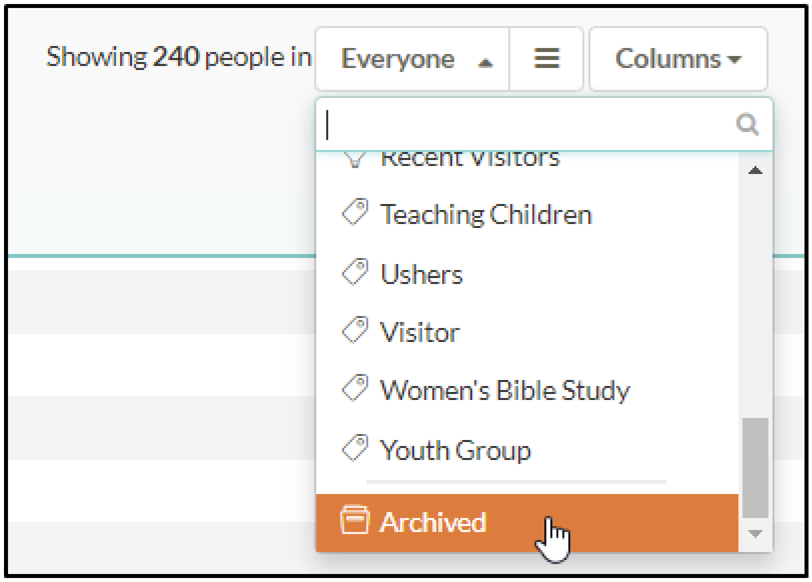
For bookkeeping purposes, it is not recommended to delete non-duplicate records to preserve historical attendance and contribution data on past annual reports.



To access the list of archived persons,

1. Go to the People view under any mode.

2. Click the drop-down menu for Smart Groups and Tags. Scroll all the way to the bottom of the menu to find the Archive.



3. Click the person's name to go into their profile. Below the Timeline section of their record, there are two options available: Unarchive,

- Click "Delete this person" button to remove the record from the site completely. This cannot be undone. Once a person is deleted, their attendance records are deleted and offerings will be changed to Loose Offerings. Households are automatically removed when empty.

- Click "Unarchive this person" to bring the record back to the main database. Because of the constant flux of interface and database updates, unarchiving records may become increasingly difficult as the software evolves.


Dave Abbott
Nonmember
Mailing Address
The Abbott Household
No address
Phone Numbers
Email Addresses
Manage Communication Preferences
Timeline
Family
Tags
Unknown
sex
Unknown
ethnic group
Unknown
birthday
No
baptized
No
confirmed
No
deceased
n/a
grade
Unknown
first communion
Unknown
medical allergy
n/a
envelope number
Never
last attended
Never
last visited
Never
last communed
Offerings
Pledges
Delete this person
Unarchive this person

Bulk Updating Fields

Depending on the field, you may need to update multiple records with the same value or option. While going into each individual record and manually changing the field is an option, the process can be long and tedious.

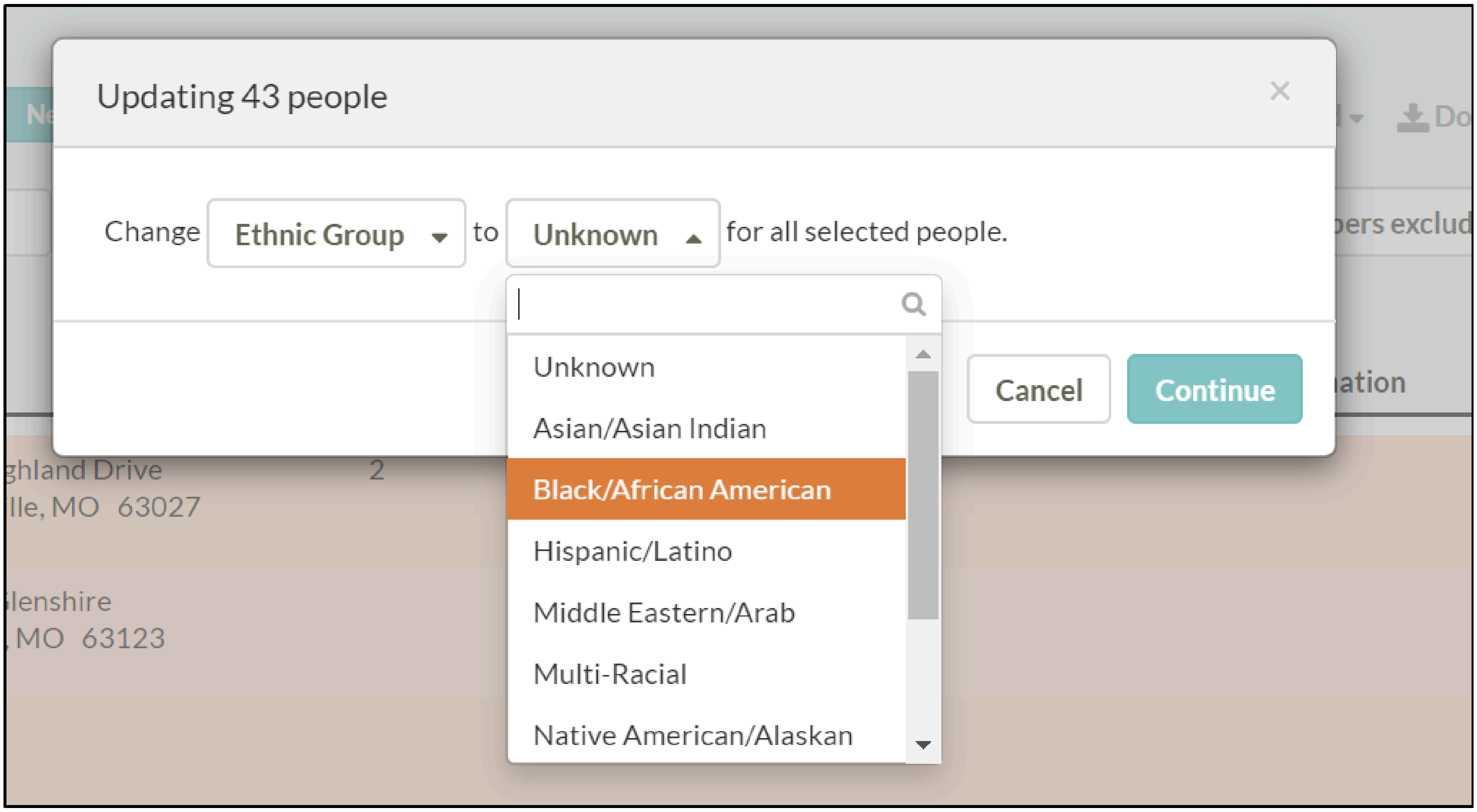
For this reason, for select fields, a mass updating tool is available to those with proper permissions.

Fields for individuals that can be changed in this way include Baptism date, Confirmation date, Ethnic Group, Grade, Household, Sex, and any custom Person fields. Household fields available for mass updates are restricted to Send Newsletter and any custom Household fields.

Changes applied to fields cannot be reverted, so caution is recommended.

To use the bulk update feature,

1. Go to the People view in either Individuals or Households mode. This utility is not available for other modes.
2. Select those you want to change, either by checking boxes next to each name or filtering using Smart Groups, traits, or tags. If filtering you will want to click the topmost checkbox to select all visible records.
3. Once the desired records have been checked, a black bar will appear at the bottom of the screen. Click the button that's labeled "Bulk Update".
4. A pop-up window will appear with the rest of the screen greyed out behind it. Choose the field to change and what you want to change the field date, text, or option to.
5. Click "Continue" and enter the number of records chosen to confirm the change.


Updating 43 people
Change
Ethnic Group
to
Unknown
for all selected people.
Unknown
Asian/Asian Indian
Black/African American
Hispanic/Latino
Middle Eastern/Arab
Multi-Racial
Native American/Alaskan
Cancel
Continue

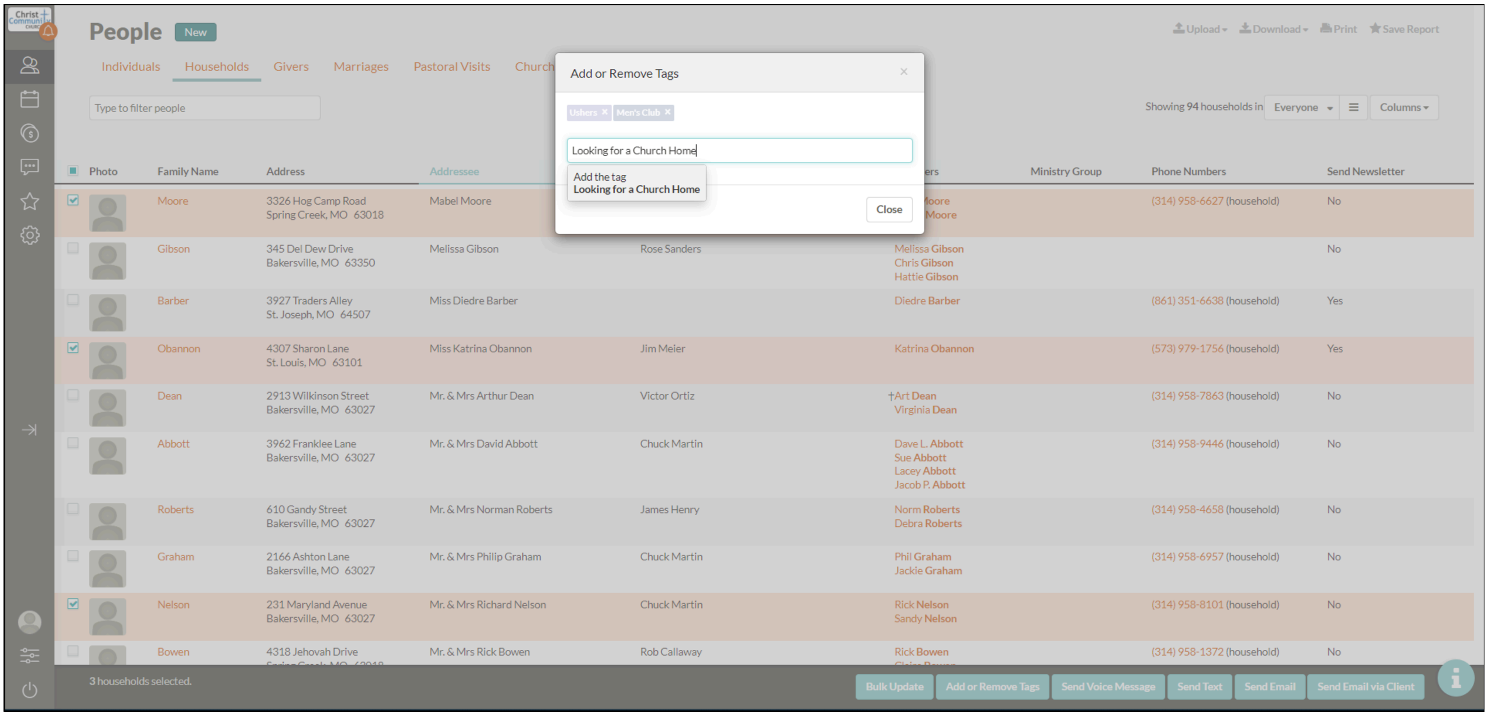
Adding or Removing Tags in Bulk

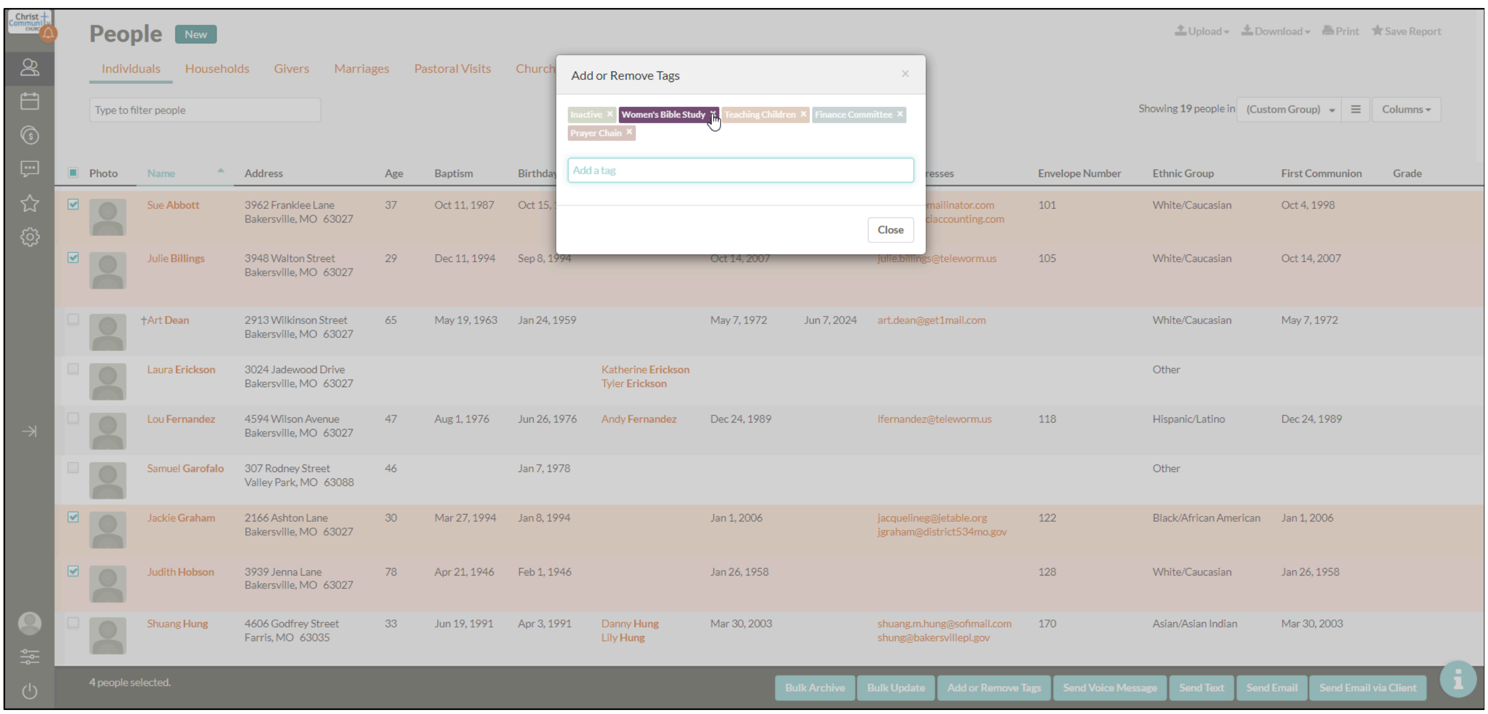
Person records can be marked with tags regarding various activities, small groups, elder assignments, volunteer opportunities, and other distinctions for easier filtering and reporting. For single records, users can open a profile and add a tag to their list quickly, but this process can be tedious if multiple records need to be updated with the same tag.

In these situations, users can use the bulk update tool on the People view for adding and removing tags.

To use the mass update tag feature,

1. Go to the People view in your preferred mode.
2. Select those you want to change, either by checking boxes next to each name or filtering using Smart Groups, traits, or other tags. If filtering, you will want to click the topmost checkbox to select all visible records.
3. Once the desired records have been checked, a black bar will appear at the bottom of the screen. Click the button that's labeled "Add or Remove Tags".
4. A pop-up window will appear with the rest of the screen greyed out behind it. This window will show all tags found on the selected records. If the tag is greyed out, the tag belongs only to some of the selected records. If the tag is not greyed out, the tag belongs to all of the selected records.
    - To add a tag, type in a tag and press the Enter key to apply the tag to all of the currently selected records.
    - To remove a tag, click the "x" at the end of a specific tag to remove it from all selected records.
5. Click "Close" to close the updater.


People
New
Individuals
Households
Givers
Marriages
Pastoral Visits
Add or Remove Tags
Ushers
Men's Club
Looking for a Church Home
Add the tag
Looking for a Church Home
Close
Showing 94 households in
Everyone
Columns
Photo
Family Name
Address
Addressee
Ministry Group
Phone Numbers
Send Newsletter
3 households selected.
Bulk Update
Add or Remove Tags
Send Voice Message
Send Text
Send Email
Send Email via Client


People
New
Individuals
Households
Givers
Marriages
Pastoral Visits
Add or Remove Tags
Inactive
Women's Bible Study
Teaching Children
Finance Committee
Prayer Chain
Add a tag
Close
Showing 19 people in
(Custom Group)
Columns
Photo
Name
Address
Age
Baptism
Envelope Number
Ethnic Group
First Communion
Grade
4 people selected.
Bulk Archive
Bulk Update
Add or Remove Tags
Send Voice Message
Send Text
Send Email
Send Email via Client

Sending Emails via your Default Email Client

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

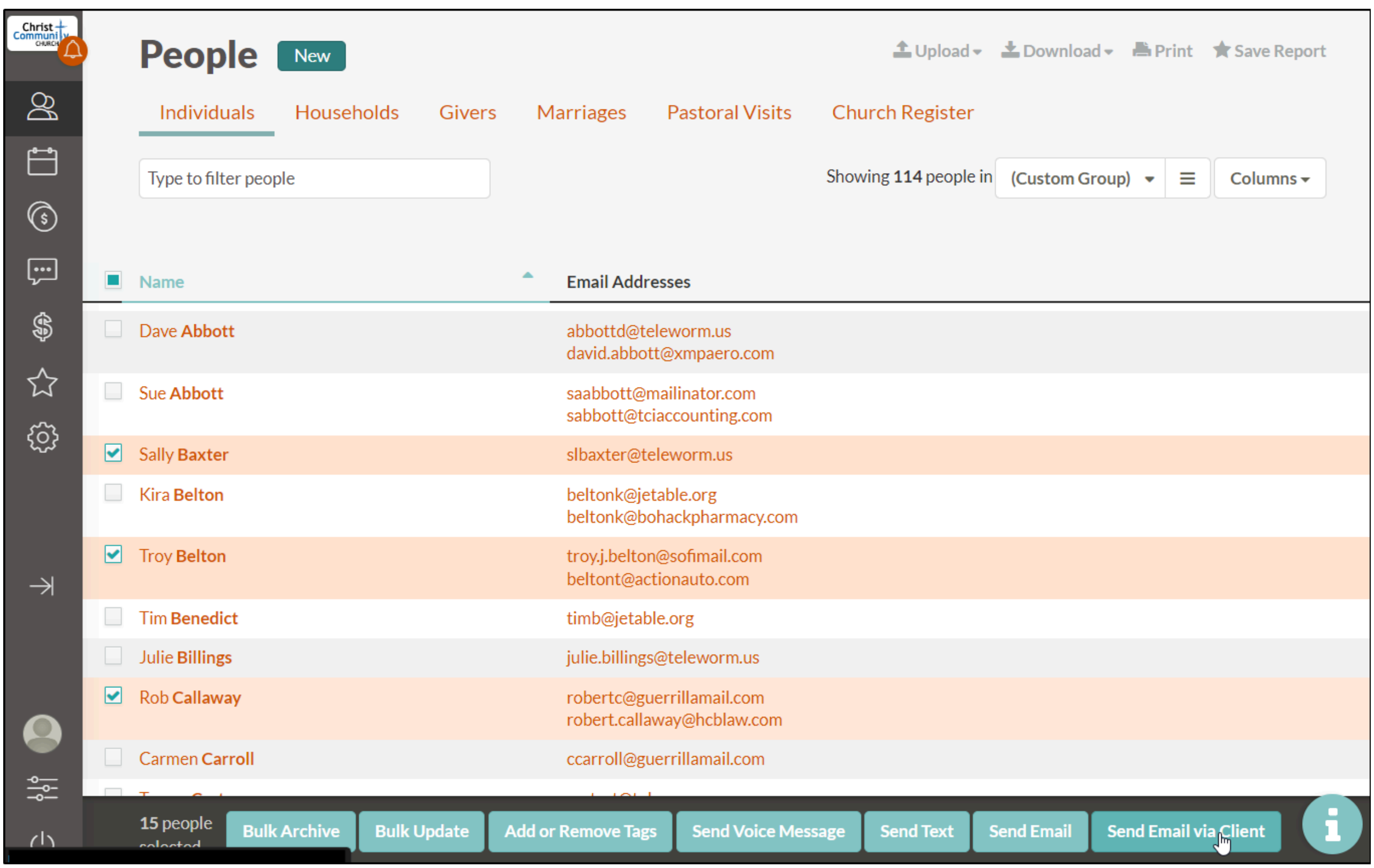
To send from your chosen email address, you must first designate the default email client. For more information on setting up your email, please visit our article on the topic.

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

To send an email through the Church360° relay,

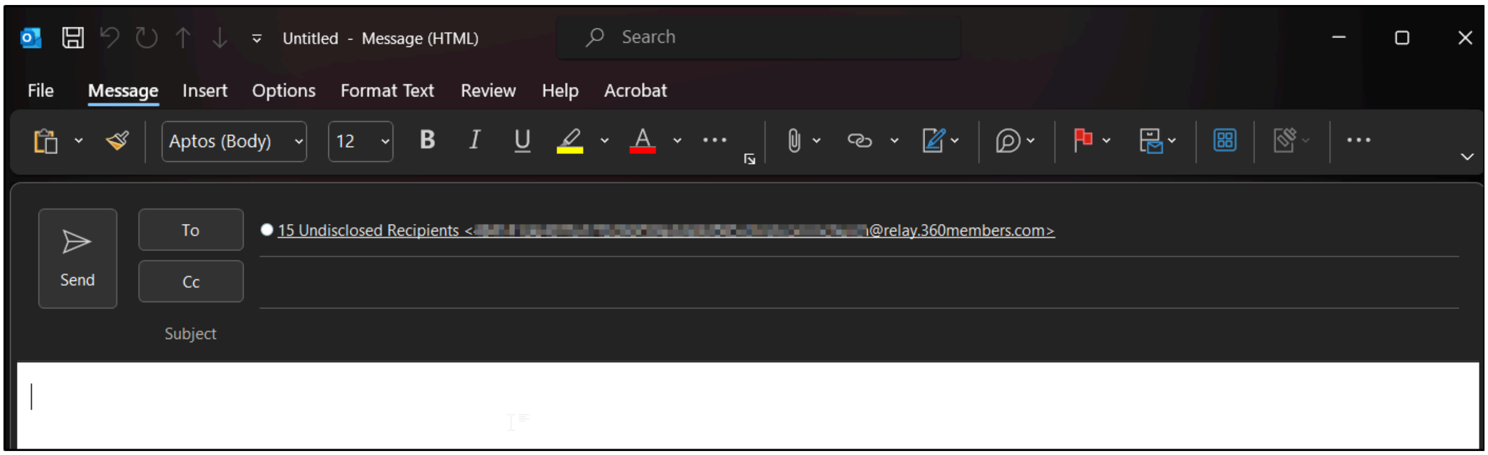
1. Go to the People view, and choose who you are looking to send your email to, either by checking boxes next to each name or filtering using Smart Groups, traits, or tags. If filtering you will want to click the topmost checkbox to select all visible records.

2. Once your selected records have been checked, a black bar will appear at the bottom of the screen. Click the button that's labeled "Send Email via Client".



3. A pop-up window will appear with the rest of the screen greyed out behind it. This window will have all available email addresses for those in your selection. You can check which addresses you would like to receive the email message. The addresses you checked will be saved and selected for the next time you send an email.

4. Click “Send.” Church360° Members will create a new email message in your default email client. In the message, the recipient will resemble a string like "XX Undisclosed Recipients<........@relay.360members.com>"



5. After typing your email message, click “Send” to send your message from your email client. This message will be sent to the Church360° email relay which will distribute the message to all recipients.

6. If any email is not delivered, you will receive a Mail Daemon message to your email client. For more information on email deliverability, please visit our article on the subject.

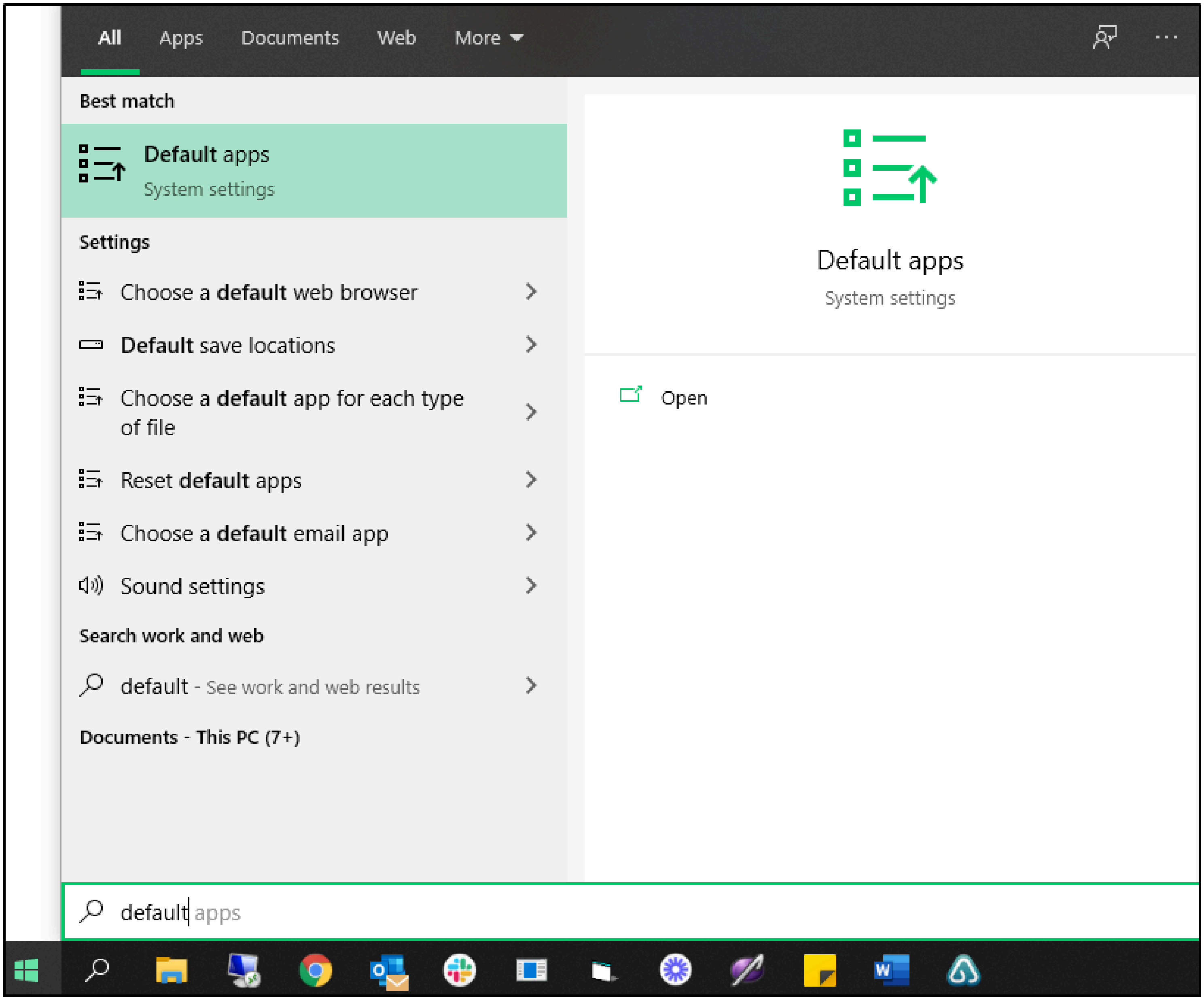
Setting a Default Email Client

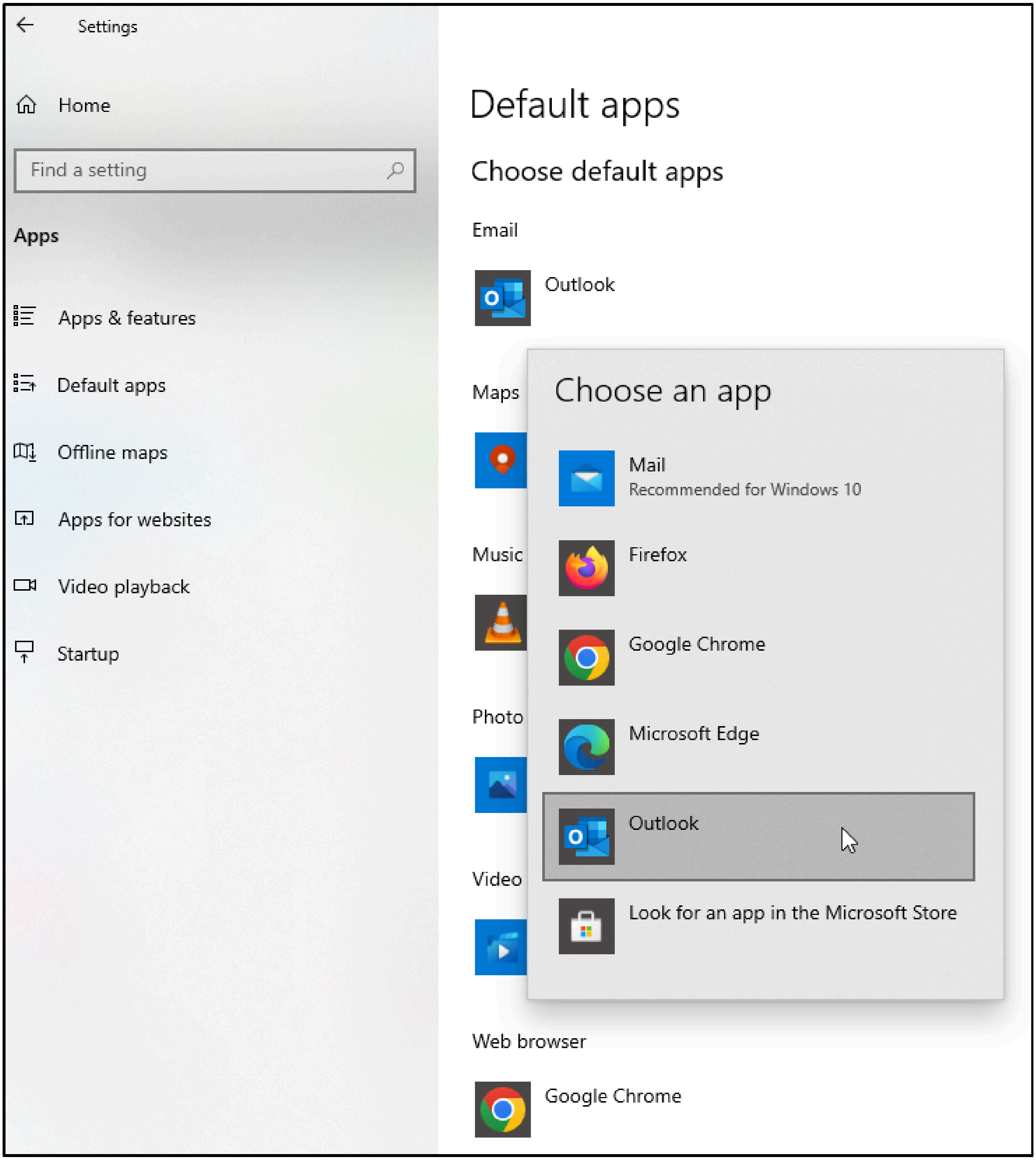
Before sending an email through the Church360 relay, you may need to set your default email program and client.

Setting a default email app in Windows 10:

To change your current default program,

1. Go down to the Windows logo at the bottom left of the screen. When the Start menu appears, start typing "Default apps".
2. Once that match appears, click on it to see your default setup. Email is usually the first app shown.

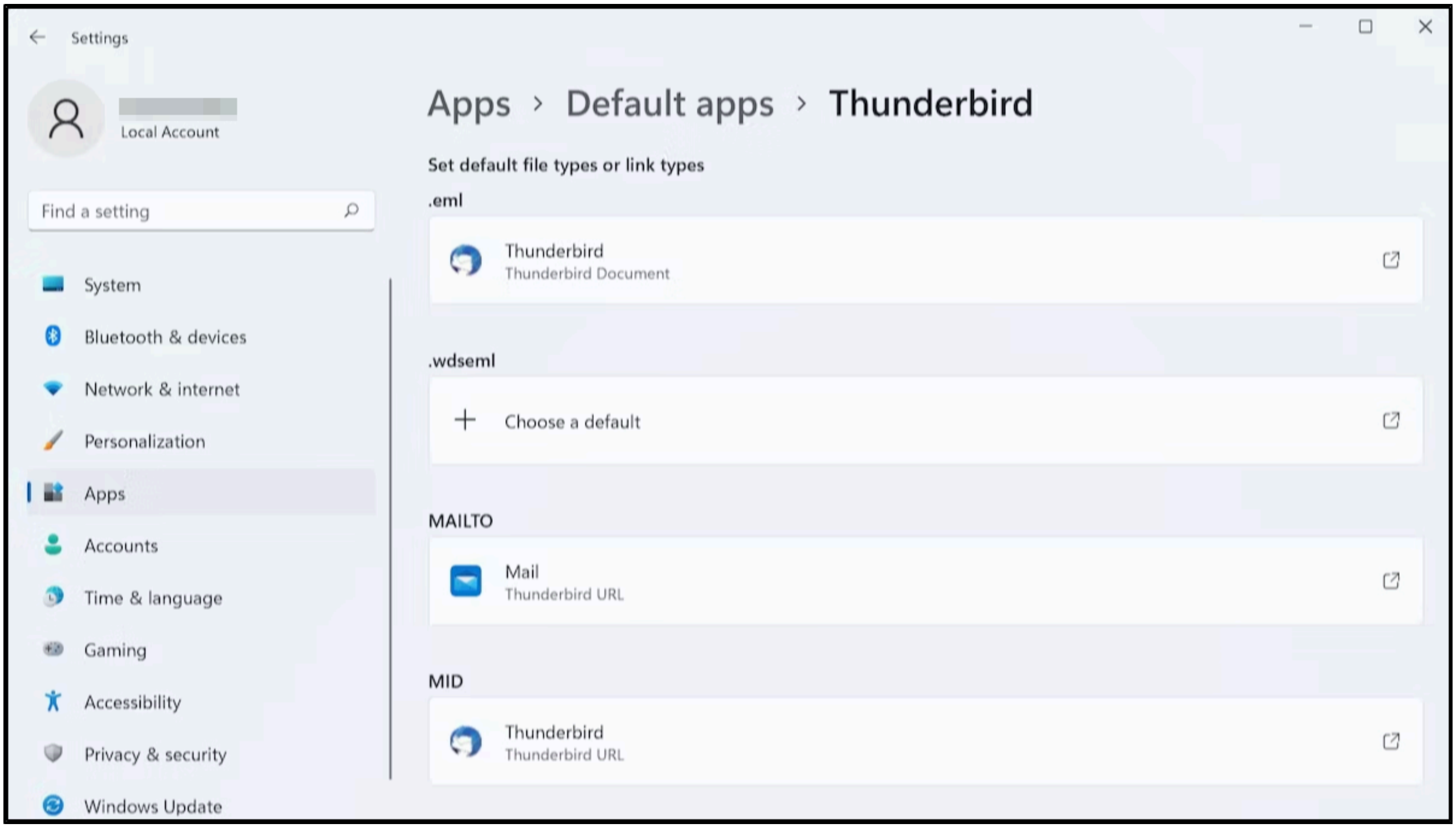

All
Apps
Documents
Web
More
Best match
Default apps
System settings
Settings
Choose a default web browser
Default save locations
Choose a default app for each type of file
Reset default apps
Choose a default email app
Sound settings
Search work and web
default - See work and web results
Documents - This PC (7+)
Default apps
System settings
Open
default apps



Setting a default email app in Windows 11:

To change your current default program,

1. Go down to the Windows logo at the bottom left of the screen. When the Start menu appears, start typing "Default apps".
2. Instead of choosing your default app for Email, you will need to choose a specific file type instead. In this case, search for the MAILTO file type and choose your preferred email client.



- 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.
- Due to some configurations on Windows, the default Windows Mail app (not Outlook) doesn't seem to work with third-party software like Church360° very well.
- 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.

If you choose a desktop application like Outlook, you should be ready to use the email relay.

If you choose to use an online email client, like Gmail, you will need to set your email client as the default in your browser.

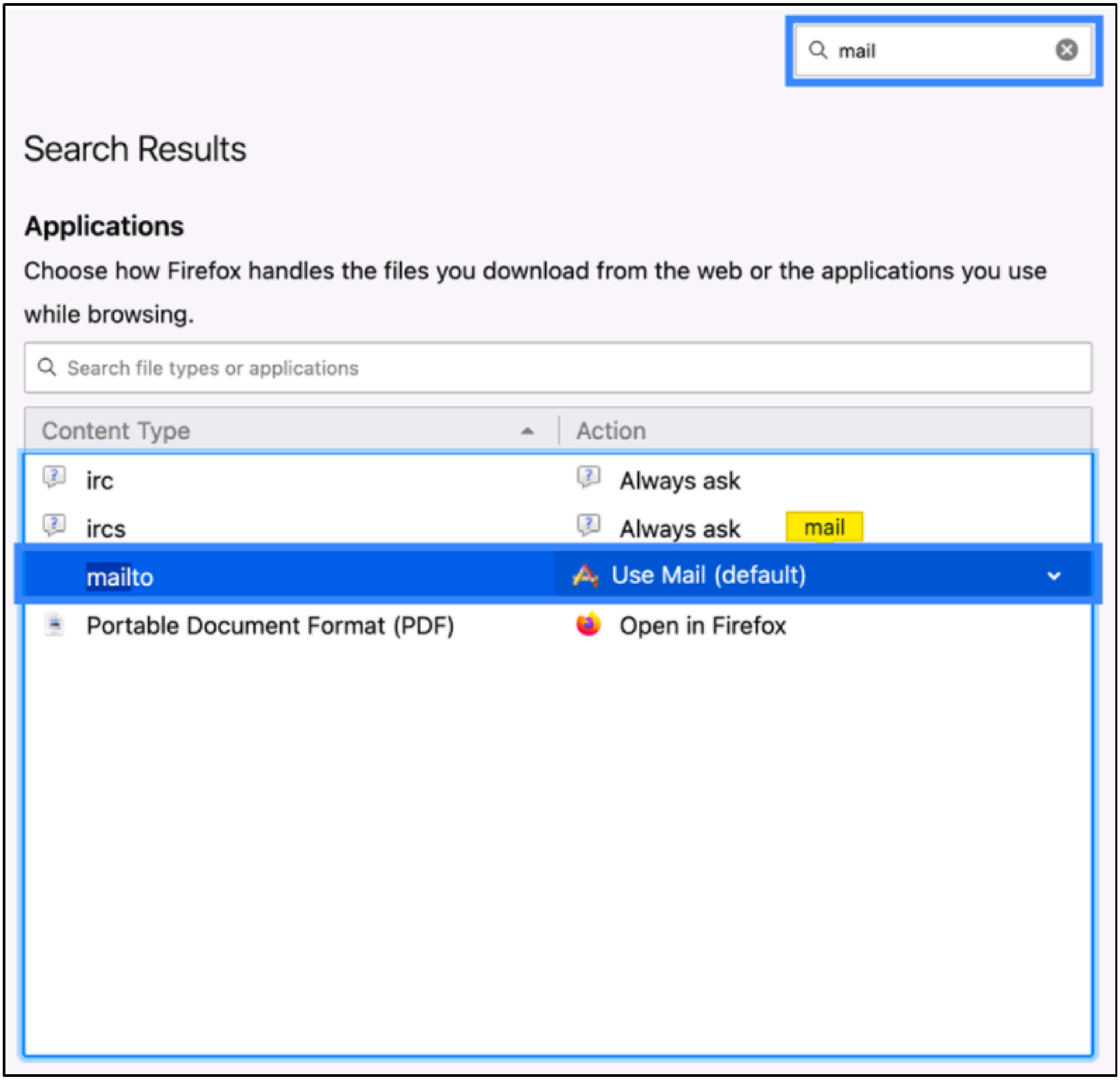
To set up a default email client in the most popular browsers (using Gmail as an example):

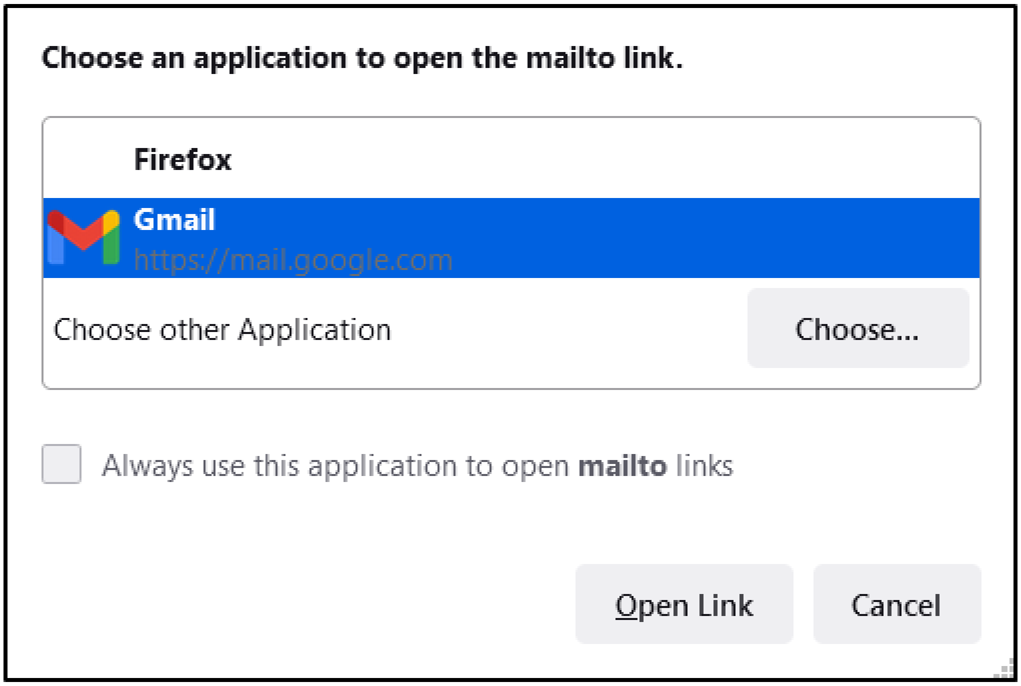
Google Chrome

1. In Google Chrome, click the three dots button near the top right corner of the browser, then click Settings.
2. On the left, click Privacy and security, then click Site Settings.
3. Click Additional permissions. Click Handlers, and make sure Allow sites to ask to become default handlers for protocols is toggled on.
4. If mail.google.com appears in the list, ensure that it is not blocked on the handlers sections of permissions.
5. Open your online email client in Chrome. In the address bar, click the double-diamond Service Handler icon.
6. When prompted to "Allow [your email client's url] to open all email links?", select Allow, then click Done. The handlers page should now have the entry for your chosen email client.

Mozilla Firefox

1. Open the Firefox menu by clicking the icon near the top right of the browser (looks like 3 horizontal lines on top of each other), then click Settings.
2. In the Find in preferences search box, type "mail" – the Applications preference will appear.
3. Beside where it says "mailto," click the Action column and select your email client.
4. Close Firefox settings.
5. When you go to send your first email through Church360°, you'll be asked to choose which application you want to use to open the mailto link. Choose your email client, and check the "Always use this application to open mailto links." box.


mail
Search Results
Applications
Choose how Firefox handles the files you download from the web or the applications you use while browsing.
Search file types or applications
Content Type
Action
irc
Always ask
ircs
Always ask
mail
mailto
Use Mail (default)
Portable Document Format (PDF)
Open in Firefox



Microsoft Edge

1. Click the three dots icon near the upper right corner of Microsoft Edge, then click Settings.

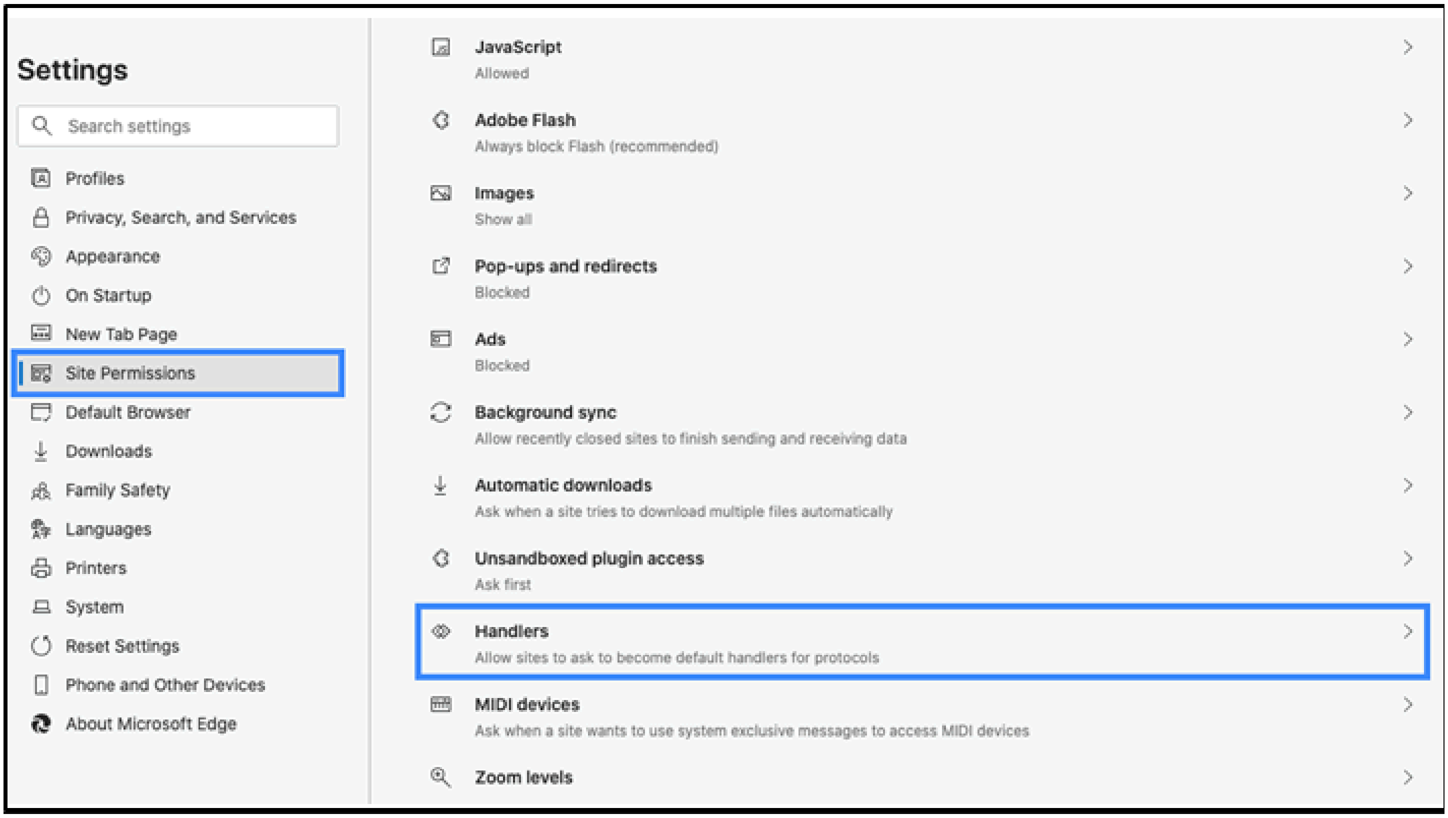
2. On the left, click Site Permissions, then click Handlers.

3. Make sure Allow sites to ask to become default handlers for protocols is toggled on.

4. Open your email client in Microsoft Edge.

5. In the address bar, click the double-diamond Service Handler icon.

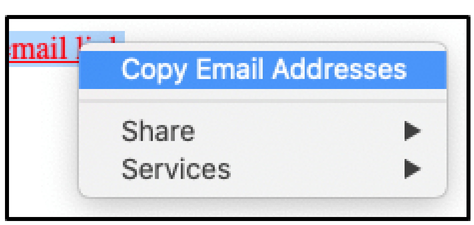
6. When prompted to Allow [your email client's url] to open all email links?, select Allow, then click Done.



Safari

Though recent versions of Safari have removed the ability to set a default mail program. There is a workaround when you encounter an email link in Safari.

1. Right-click (or hold Control, then click) the email link.
2. Click Copy Email Address(es).
3. Open your email client in Safari.
4. Click Compose.
5. Click the To: field, then press Command+V on your keyboard to paste the email address(es) you copied. You can also right-click (or hold Control, then click), then click Paste.



Navigating Person Records

An individual’s profile view displays specific information about the individual and is divided in different sections on the left, center, and right areas of the screen.

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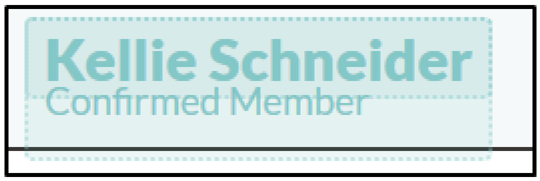
On the Left of the Screen



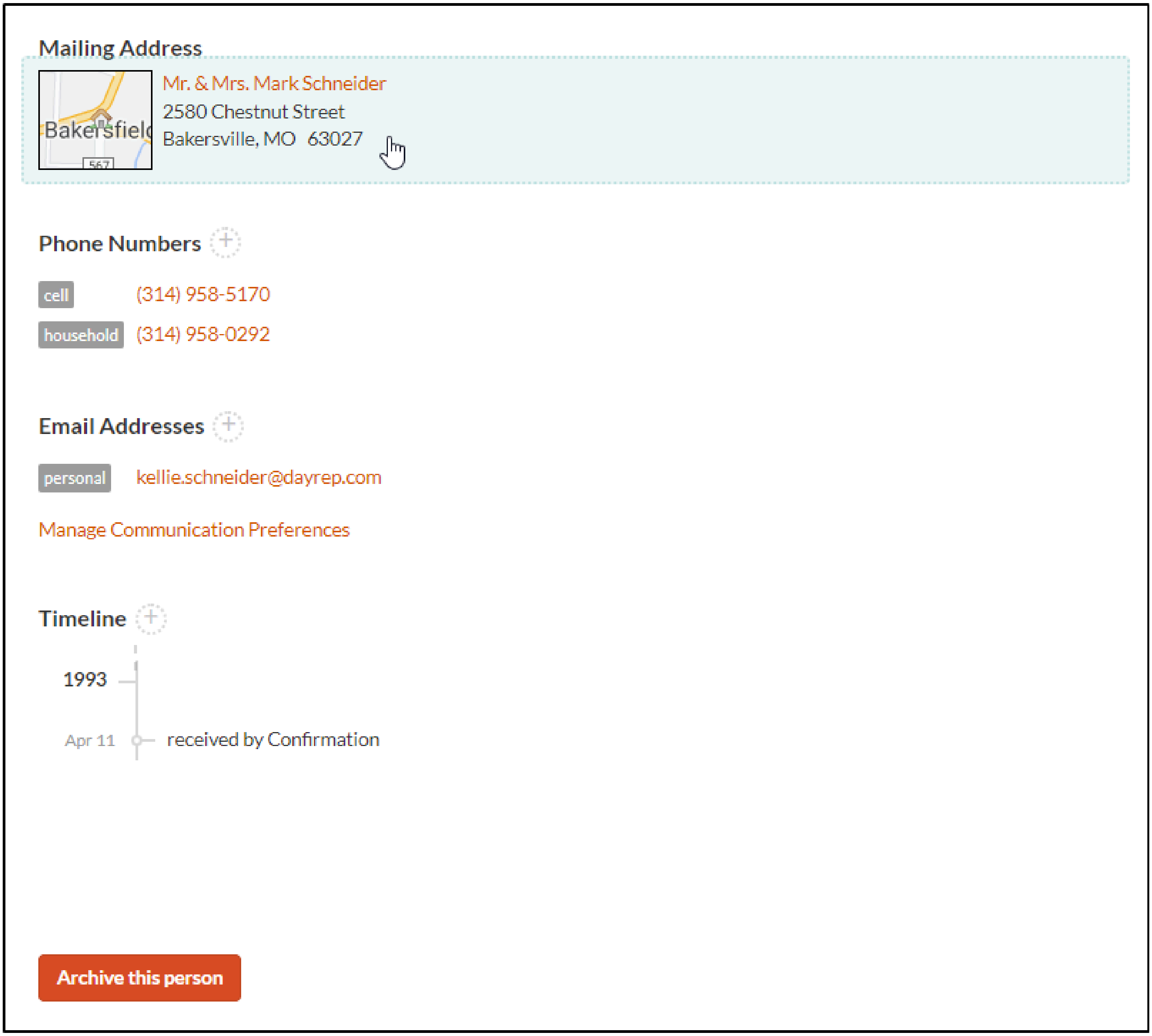
Name – Clicking the name in a person record allows access to the individual’s Title, First Name, Middle Name, Last Name, Legal Name, Maiden Name, and Suffix.

- Note: The Legal Name will be the name that is used on Contribution Statements.

Type of Member – Below the record’s name is the individual's membership status (Member, Baptized Member, Confirmed Member, and Non-Member)

Displayed Status	Criteria Used
Member	• Marked as being received as a member in the Timeline section of the person record • Not marked as having been baptized • Not marked as having been confirmed • Not marked as being removed from membership in the Timeline section of the person record
Baptized Member	• Marked as being received as a member in the Timeline section of the person record • Marked as having been baptized • Not marked as having been confirmed

	• Not marked as being removed from membership in the Timeline section of the person record
Confirmed Member	• Marked as being received as a member in the Timeline section of the person record • Marked as having been confirmed • Not marked as being removed from membership in the Timeline section of the person record
Non-Member	• Not marked as being received as a member in the Timeline section of the person record OR • Marked as being received as a member in the Timeline section of the person record • Marked as being removed from membership in the Timeline section of the person record



Mailing Address - This area displays data derived from the individual's household record and can be edited from the individual's profile by clicking on the address.

- Note: Any changes made here will be reflected in the records of all members of the household. If the person has an alternate address, please use the Away address section located below the mailing address.

Phone numbers - This area shows any household number(s) listed in the household profile as well as any personal phone numbers (work, cell, or home).

Email Addresses - This area shows any household email address(es) listed in the household profile as well as any personal phone numbers (personal, work, or home).

- Note: Invitations to create a Church360° login will not be sent to household or home email addresses. The system requires the individual to have either a personal or work email.

Timeline - This area displays any notes, pastoral visit history, or membership status changes related to the individual.

Archive this person - This button will send the individual's record to the Archived view, where their data is saved but separated from active use.

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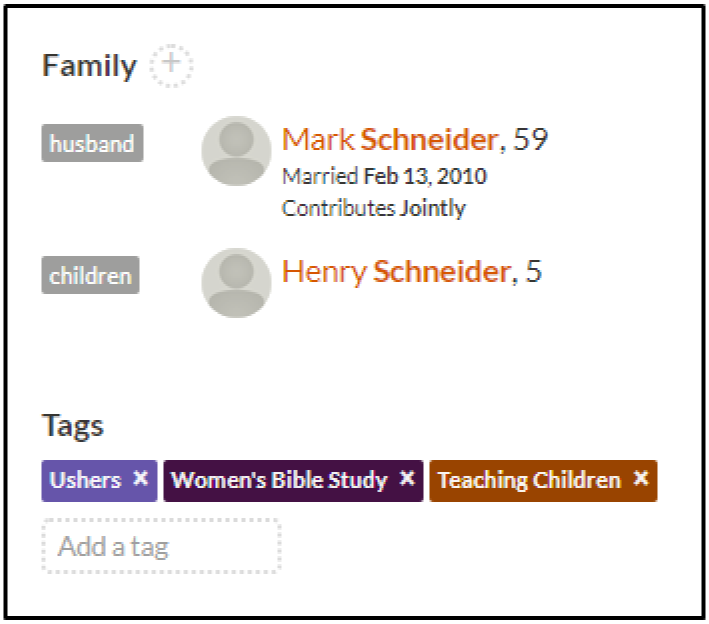
At the Center of the Screen



Family - This heading displays current linked family members and their relationship to the family unit, including marital, parental, and sibling relationships.

Tags - If the individual has any tags assigned to them, they are listed on the main profile screen below the Family section. Tags can include email lists, activity participation, spiritual gifts and skills, and other miscellaneous data that can be filtered in the People view.

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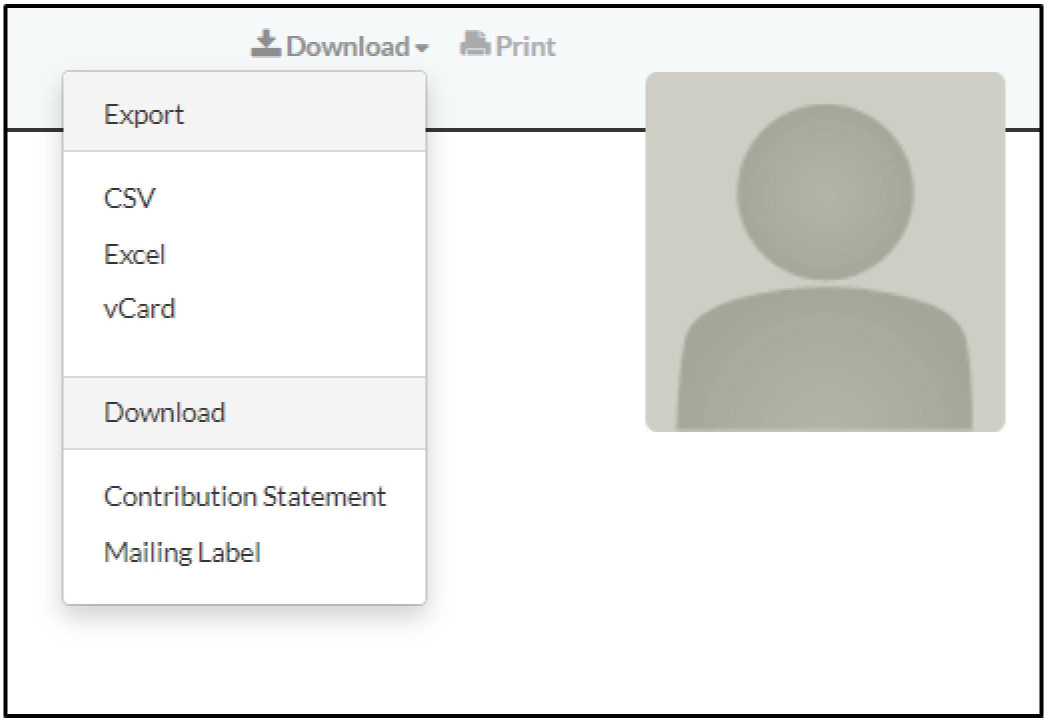
On the Right of the Screen

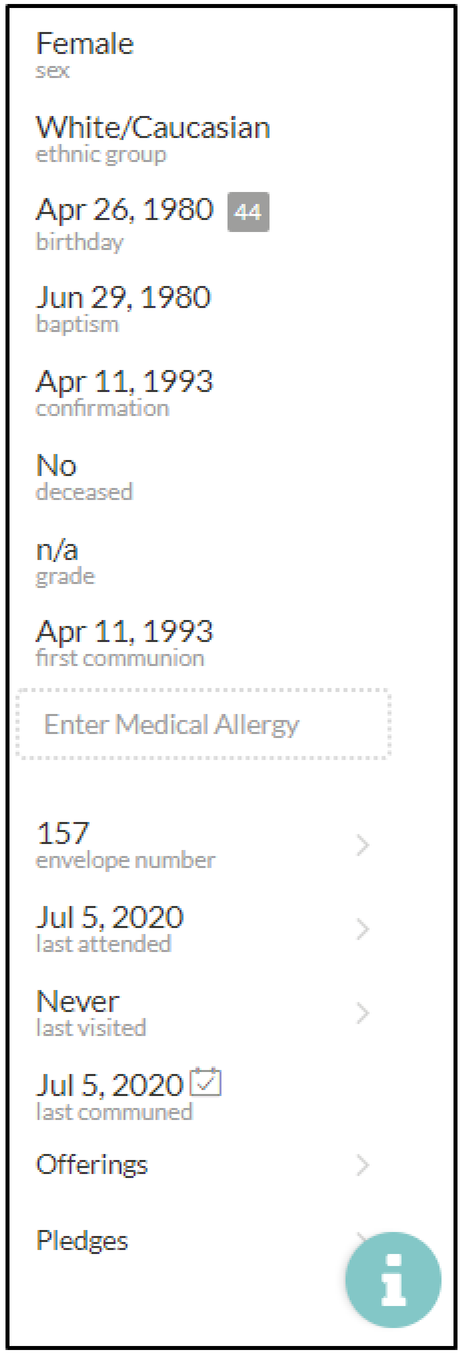


The buttons located to the far right of the record name contain options to download and print information related to the individual's record, including contribution statements and mailing labels.

Download - This feature allows you to export information about the person to a CSV, Excel file, or vCard or download reports for an individual, like a contribution statement or single mailing label.

Print - This feature prints the profile of the currently selected individual. To print statements or labels, use the Download feature above.

Profile Photo - The individual's profile photo will appear in the top right corner of the screen.



Additional information about the individual is displayed on the right side of the screen underneath the profile photo. Any custom fields created would be displayed here as well.

Sex - This field lists the gender of the individual, if known.

Ethnic group - This field lists the individual's race, if known.

Birthday - This field displays the individual's birth date with the age displayed next to it.

Baptism - This field displays if the individual is baptized and the baptism date, if known.

Confirmation - This field displays if the individual is confirmed and the confirmation date, if known.

Deceased - This field displays if the individual is deceased and the death date, if known.

Grade - This field displays the individual's current school grade, if applicable.

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

Envelope number - This display holds the individual's current envelope number and contains a link to the envelopes view if clicked.

Last attended - This display holds the last date an individual attended any event and contains a link to the Attendance Detail report for that individual, if clicked.

Last visited - This display holds the individual's last pastoral visit and contains a link to a filtered Pastoral Visits view for that individual, if clicked.

Offerings - This link will take you to a filtered Offerings view for that individual, if clicked.

Pledges - This link will take you to a filtered Pledges view for that individual, if clicked.

Navigating Household Records

The profile view for a household will display information about the household as a whole, applying to all of its members. From here, you can see a variety of information, divided in different sections on the left, center, and right areas of the screen.

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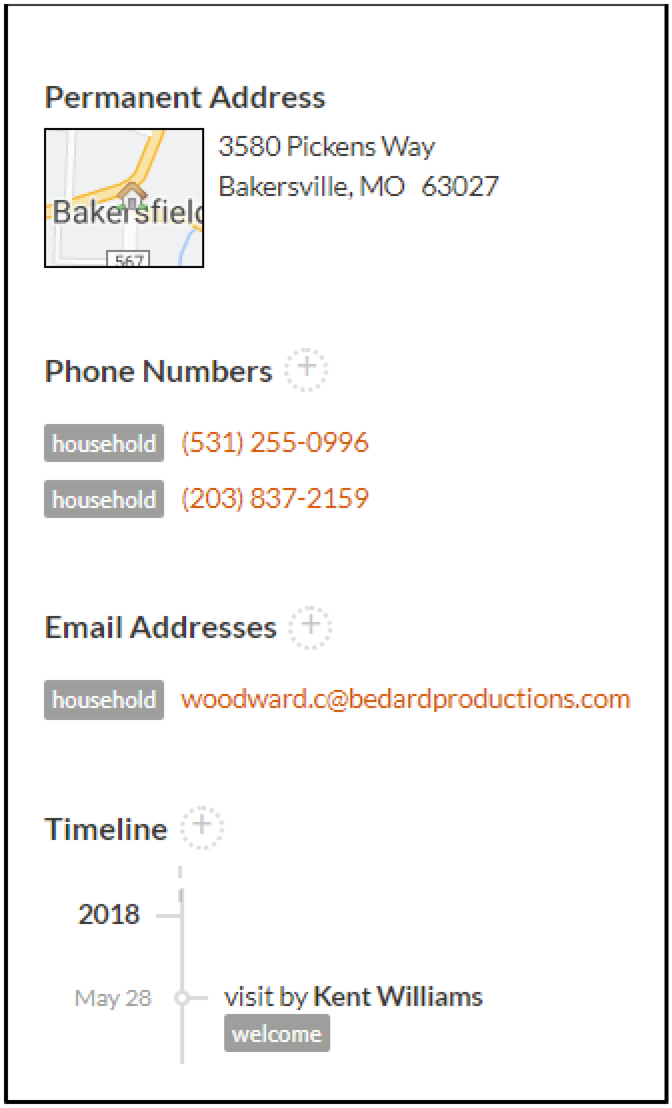
On the Left of the Screen

Family Name/ Addressee - Clicking the surname in a household record allows access to the household's Family Name and Addressee fields.

- Note: The Addressee will be what is displayed on mailing labels generated for the household.



Permanent address - This area displays the physical location of a household and can be edited by clicking on the address. Addresses can be marked as unlisted.

- Note: Any changes made here will be reflected in the records of all members of the household.
- Note: If a household has a different mailing address (like a PO Box) or has an additional address (like snow birds), you can click the box stating "My mailing address is different" to add an additional address for the entire household.

Phone numbers - This area displays all household phone numbers listed for the household. This does not include work, cell, or home phone numbers found on each member's individual profile.

Email Addresses - This area displays all household email addresses listed for the household. This does not include personal, work, or home email addresses found on each member's individual profile.

Timeline - This area displays any notes or pastoral visit history related to the household.

- Note: Any notes added to the household will also appear as a note on each person within the household.

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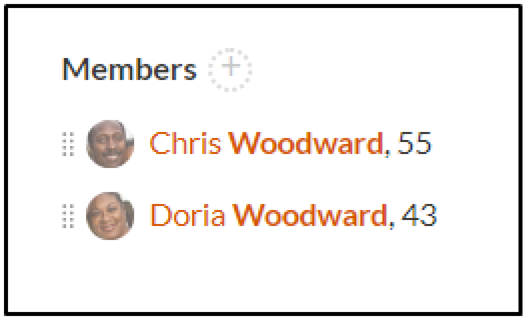
At the Center of the Screen



Members - Shows all person records currently residing at this household.

- Note: Users can drag member names under Members into the order they would like them to appear on a directory.

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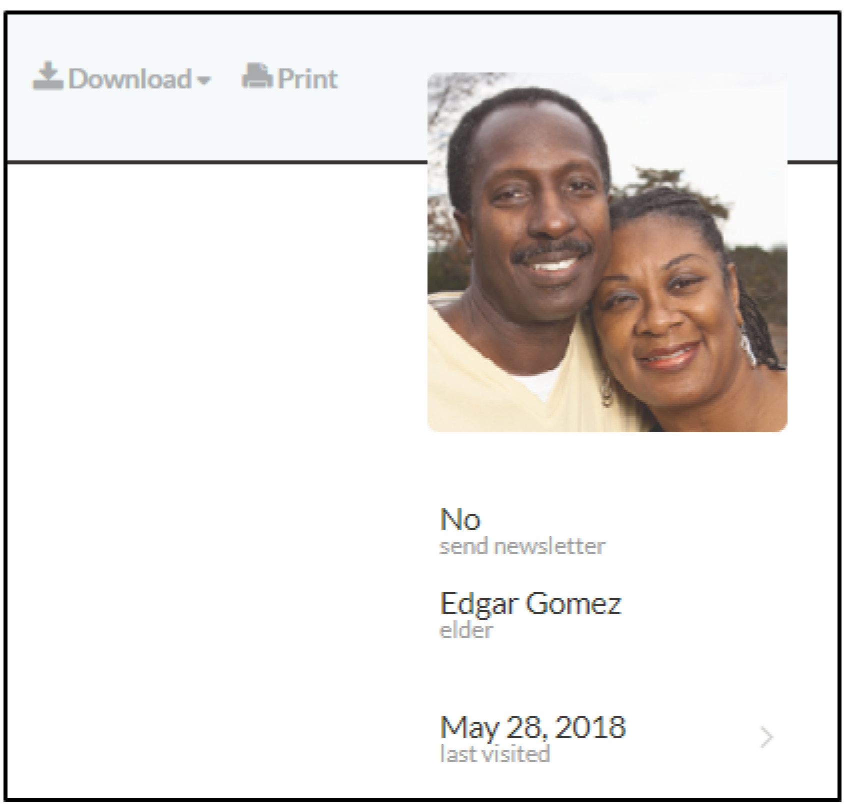
On the Right of the Screen



The buttons located to the far right of the record name contain options to download and print information related to the individual’s record, including contribution statements and mailing labels.

Download - This feature allows you to export information about the household to a CSV or Excel file or download reports for an individual, like a single mailing label.

Print - This feature prints the profile of the currently selected household. To print a label, use the Download feature above.

Profile Photo - The household's profile photo will appear in the top right corner of the screen.

Any custom fields created for households would be displayed below the profile image.

Last visited - This display holds the household's last pastoral visit and contains a link to a filtered Pastoral Visits view for that household, if clicked.

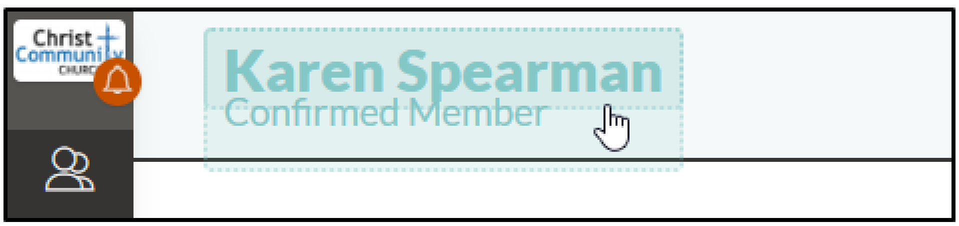
Updating a Person's Name

If a person's name has a typo or needs to be updated, users can make changes from the person's Individual profile.

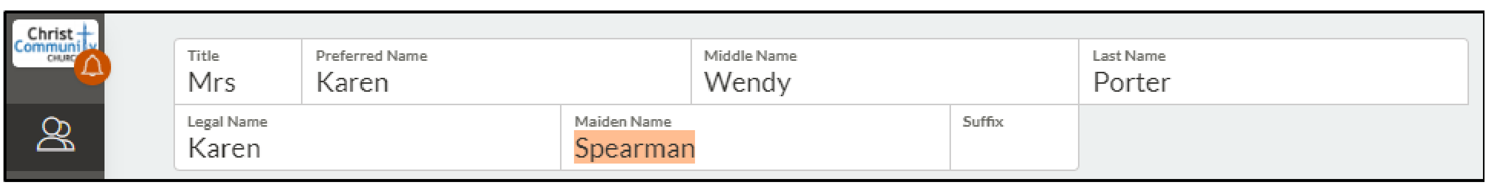
By clicking on a person's name, users can update a person's title, preferred name (for most views and reports), middle name, last name, legal name (for contribution statements), maiden name, or suffix.

1. Click on the individual name to open the profile.

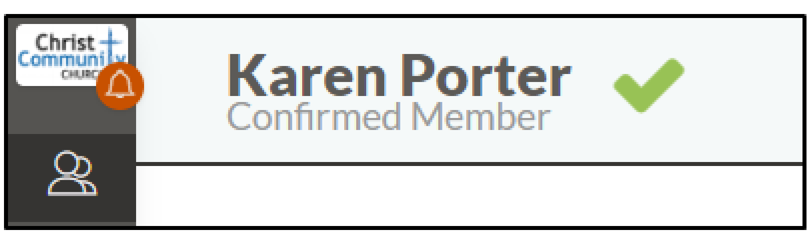
2. Click on the name at the top of the page.



3. Update any of the available name fields as needed.



4. Click anywhere outside of the name edit box to save your changes. The change will be shown with a green checkmark.



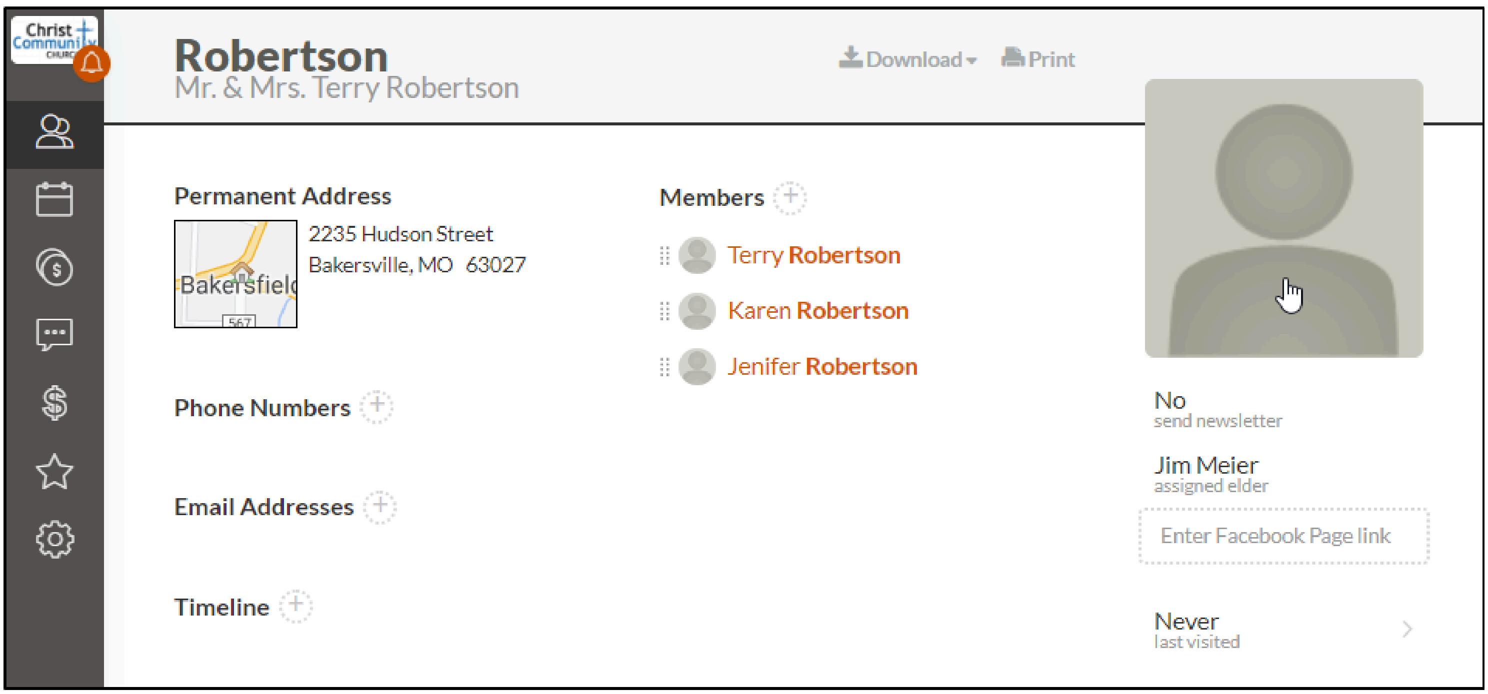
Adding Images to Profiles

Images can be added to individual or household records that can be viewed from the People view or included in directory downloads.

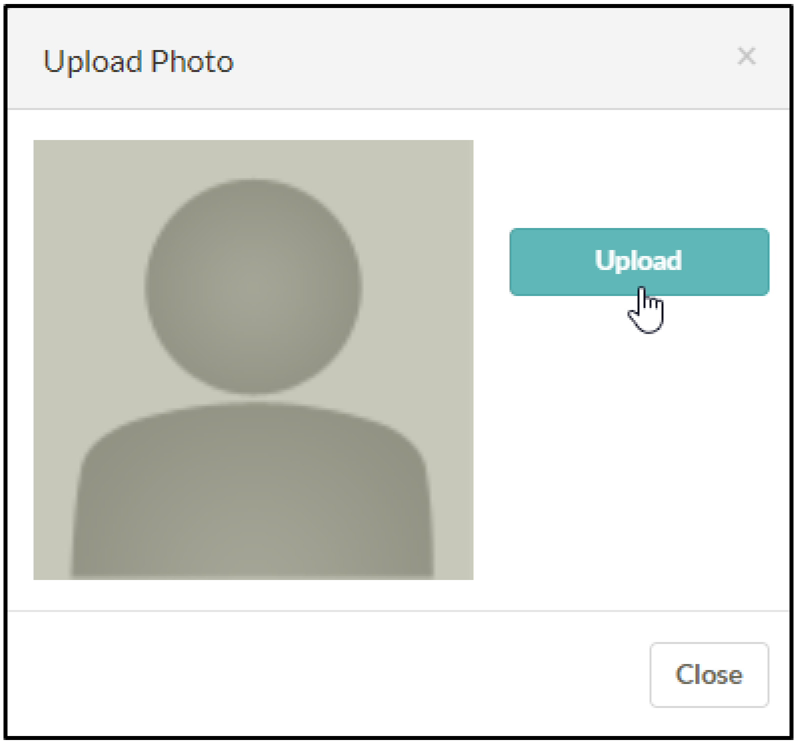
To add an image to a profile,

1. Click a person or household record to open it for editing.

2. Click the placeholder image at the top right of the profile to open the upload window.

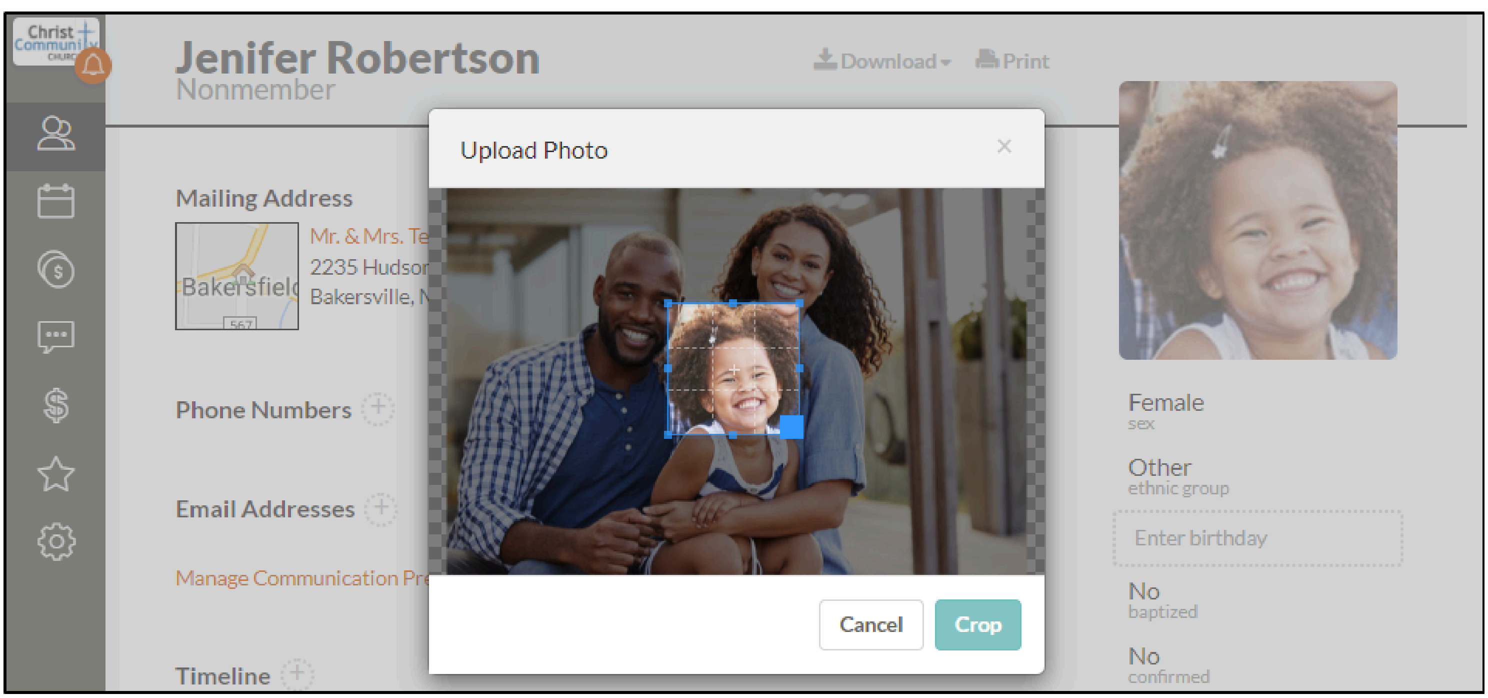


3. Click "Upload" to open your file explorer to find and choose the image you want. Church360° accepts JPEG, PNG, GIF, and BMP file types for profiles.



4. Once an image has been uploaded, three additional functions become available.

- The "Replace" button reopens your file explorer for you to find and choose a replacement for your current image.
- The "Crop" button opens an editing window where you can adjust and resize the cropping square around your image for a better fit. Click "Crop" again to save your change.
- The "Remove" button will remove the image from the field completely and will leave only the placeholder image.



5. Click "Close" to save your changes and close the upload window.

It's important to note that the type of directory you generate will determine whether the household or individual image are shown. If your directory is generated from Households mode, the image added to the household record will be available whereas directories generated from Individuals mode will show the image from the person record.

Updating Contact Information

To ensure the ability for your church to reach your congregation, you will want to maintain accurate contact information for your records.

Depending on an administration's needs, contact information can be added for both an individual person and their entire household. Phone numbers and emails added to a household will be reflected on an individual's record (marked as "household") but contacts for each member is not visible on the household record.

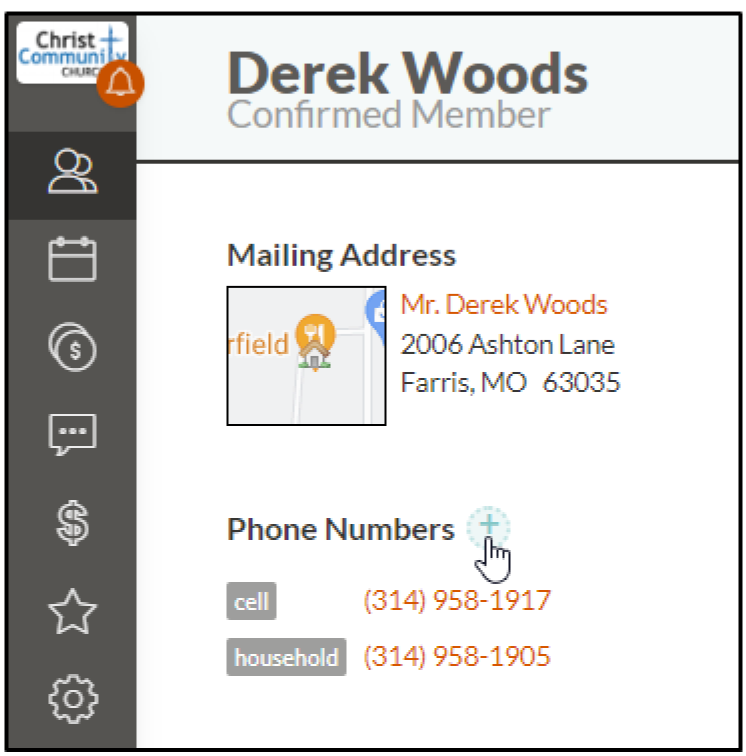
Note: If this person is going to be invited to create a login for your Church360° Members site, you will want to make sure they have at least one email listed as a personal or work email for the login to be created.

To add a phone number,

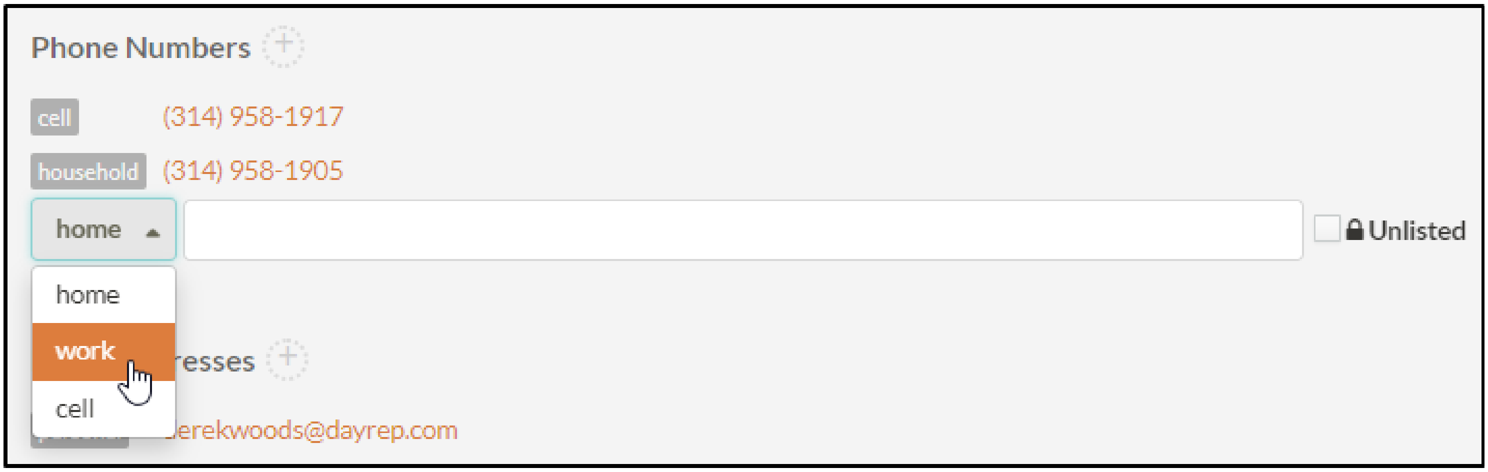
1. From the People's view, click on the individual or household name to open the profile.

2. The Phone Numbers section is located on the left of the page underneath the Address section.

3. Click the plus sign next to the heading to add a new entry.

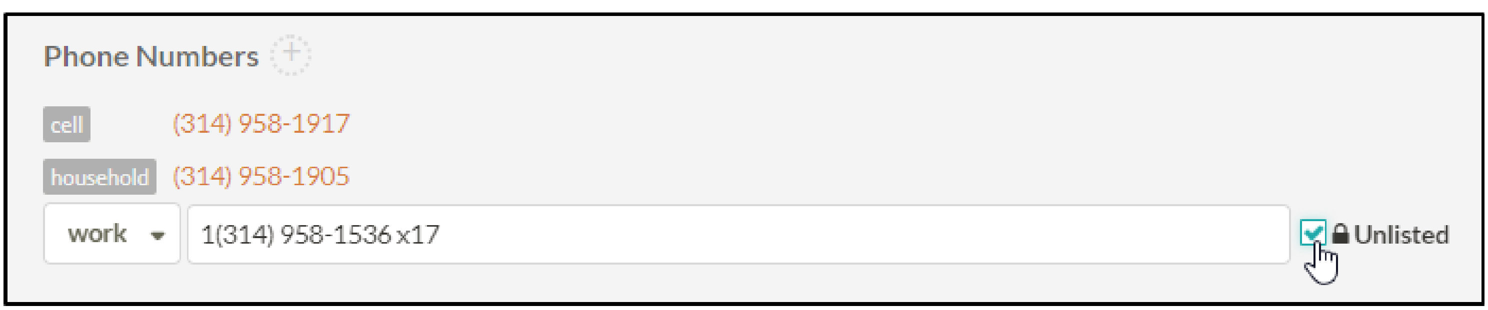


4. Use the drop-down menu to mark the contact as home, work, or cell (for person records) or household.



5. Type in the eleven digit phone number including the country and area code, if possible. All additional digits will be added as an extension.

6. If you don't want this number to show on any directories, check the Unlisted box.



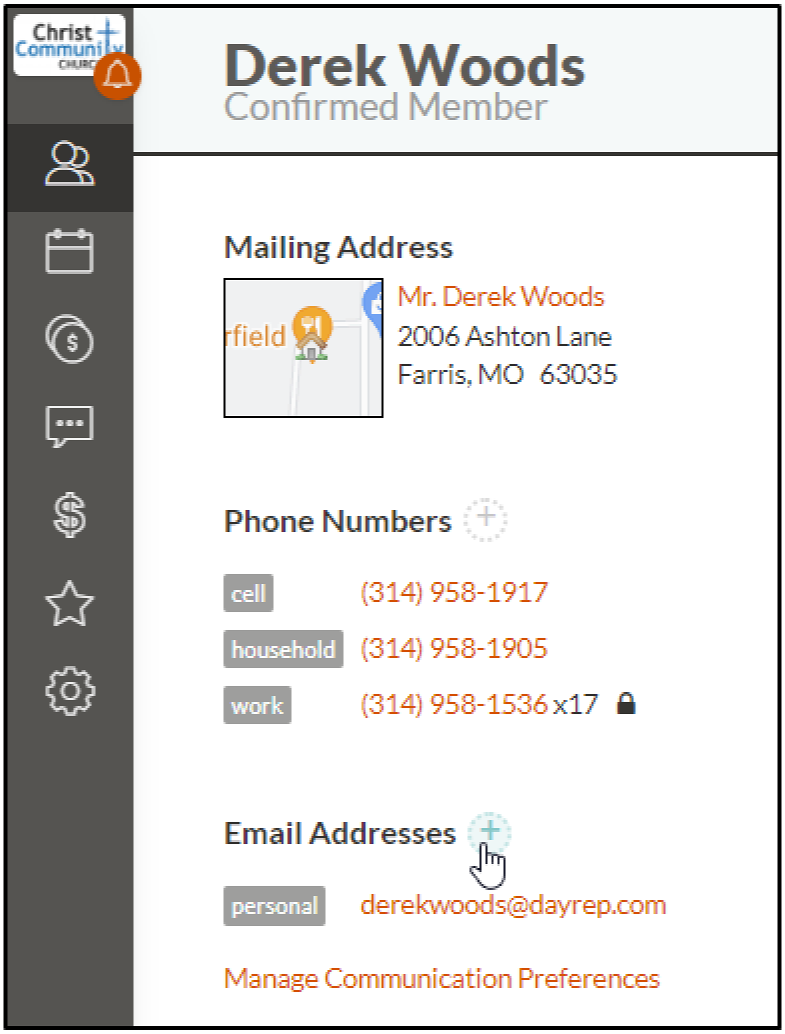
7. Click anywhere outside of the edit field to save your changes.

To add an email,

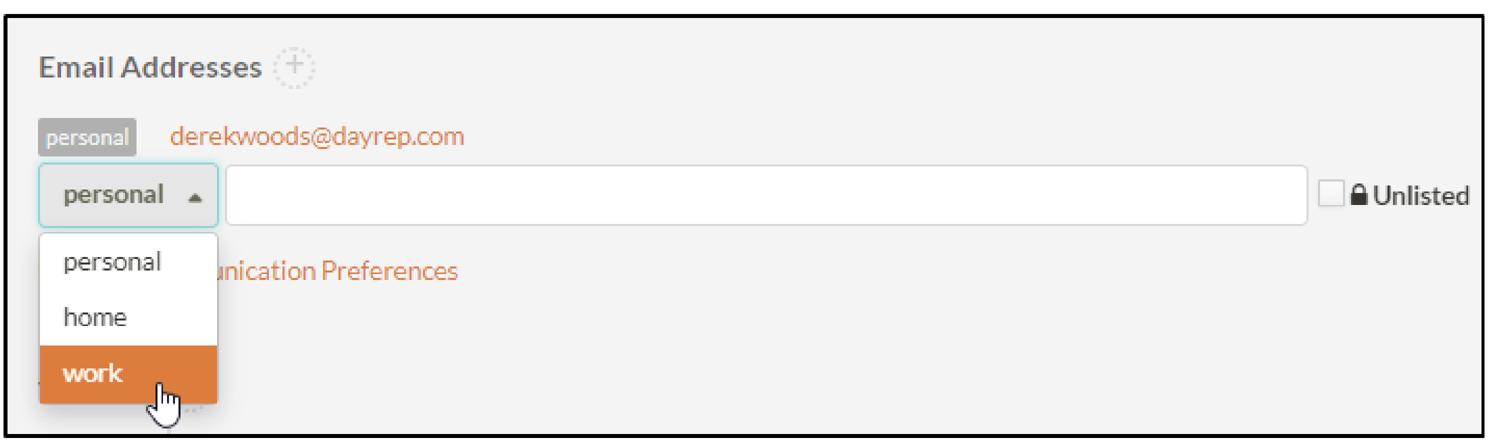
1. From the People's view, click on the individual or household name to open the profile.

2. The Email Addresses section is located on the left of the page underneath the Phone Numbers section.

3. Click the plus sign next to the heading to add a new entry.



4. Use the drop-down menu to mark the contact as home, work, or personal (for person records) or household.



5. Type in the email address. Any addresses without an "@" symbol or dot com extension will not be validated and will not be available for emailing within the software.

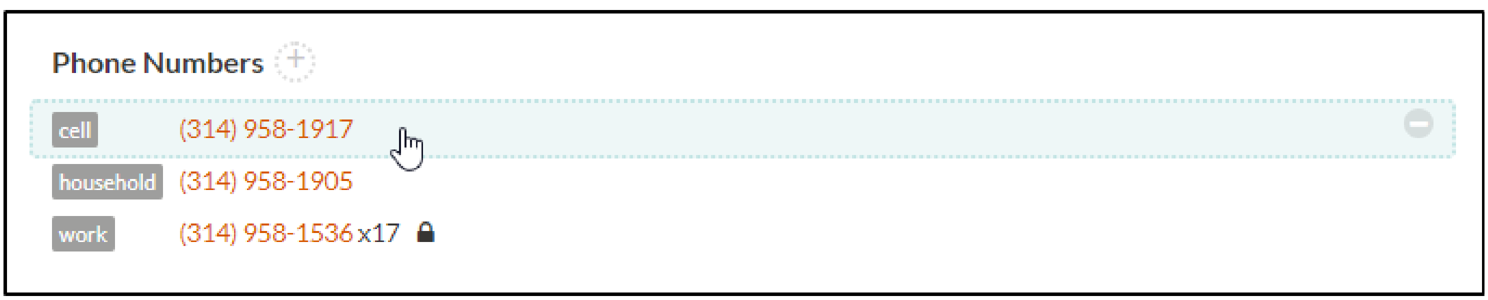
6. If you don't want this email to show on any directories, check the Unlisted box.

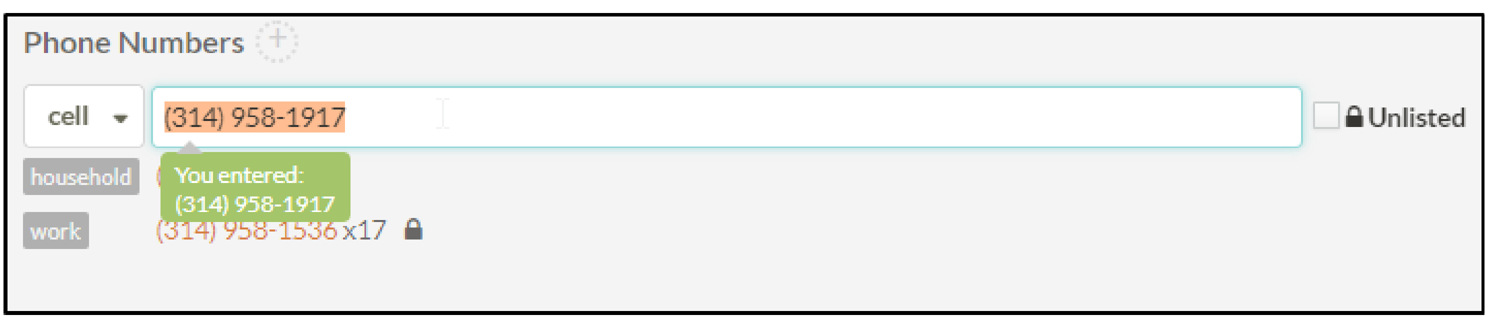
7. Click anywhere outside of the edit field to save your changes.

To edit a contact,

1. Click the household or person name to open the record for editing.

2. Click the contact you want to edit and make any changes you need.



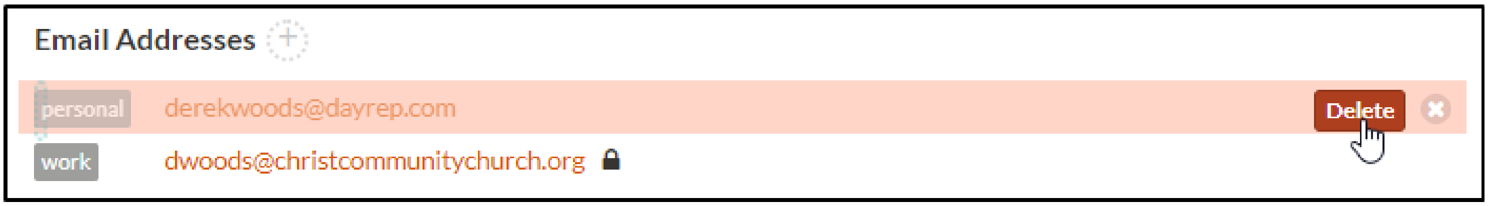


3. Click anywhere outside of the edit field to save your changes.

To remove a contact,

1. Hover over the contact you want to remove until a minus sign appears.

2. Click the minus sign and "Delete" to remove that contact from the record permanently.



Moving an Individual to another Household

For children off to college or a spouse to a nursing home, you may elect to either leave them in their current household but add an away address for the individual. Or, if you'd rather, you can also move them into their own household with their own address. This choice is dependent on the specific situation and your office's preference.

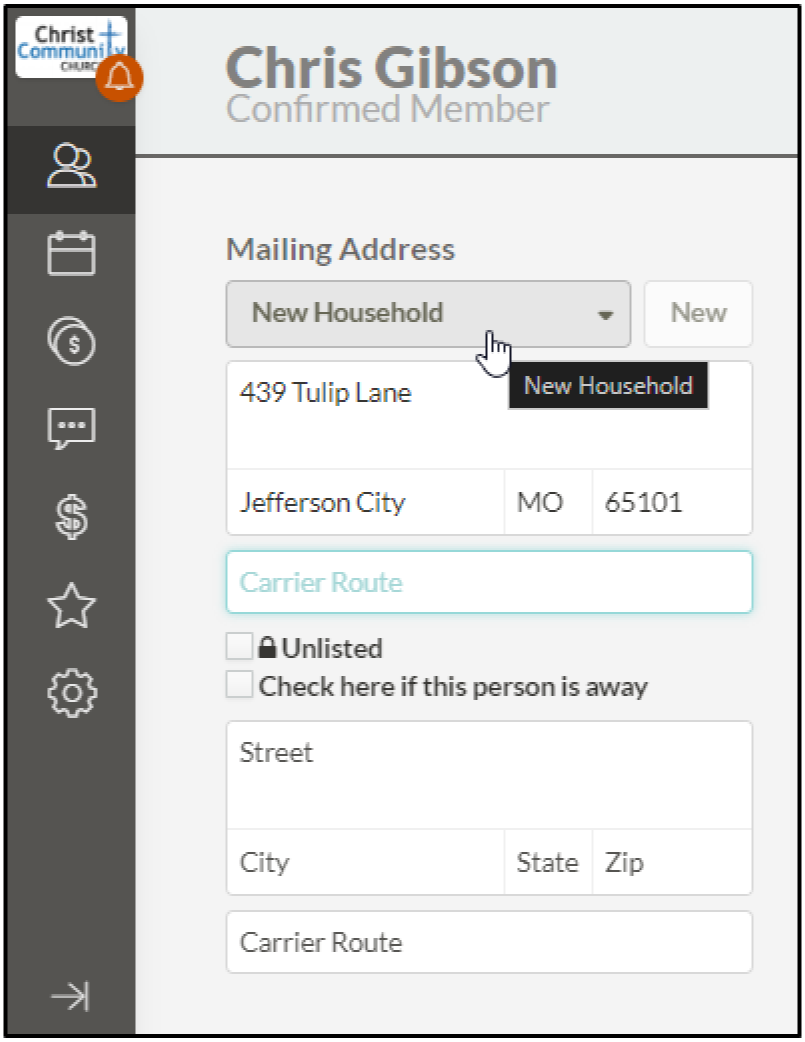
If you elect to move them into their own household, their relationships will not be affected: Church360° views a household simply as a shared location or address for grouping and mailing purposes.

To move a person to another existing household,

1. Select the profile of the individual from the People view (for reference, person records will have a Family section whereas household records have a Members section).

2. Click the Mailing Address section to open it for editing. The section should highlight in a faint blue when you hover over it. You don't want to click on the orange link to take you to the household record.

3. Select the desired household from the drop-down menu if the household has already been created. If the individual is moving to a new household, input the new address.



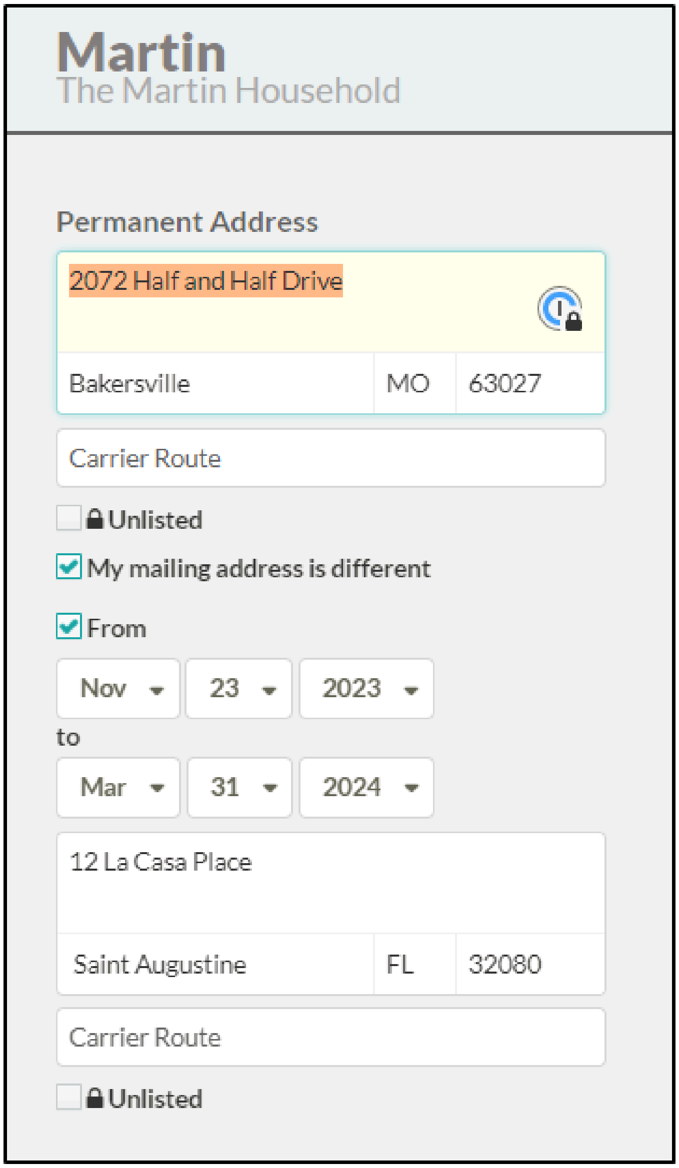
4. Click anywhere outside the box to save your changes. You may be prompted whether you are updating the current address or if you are creating a new household.

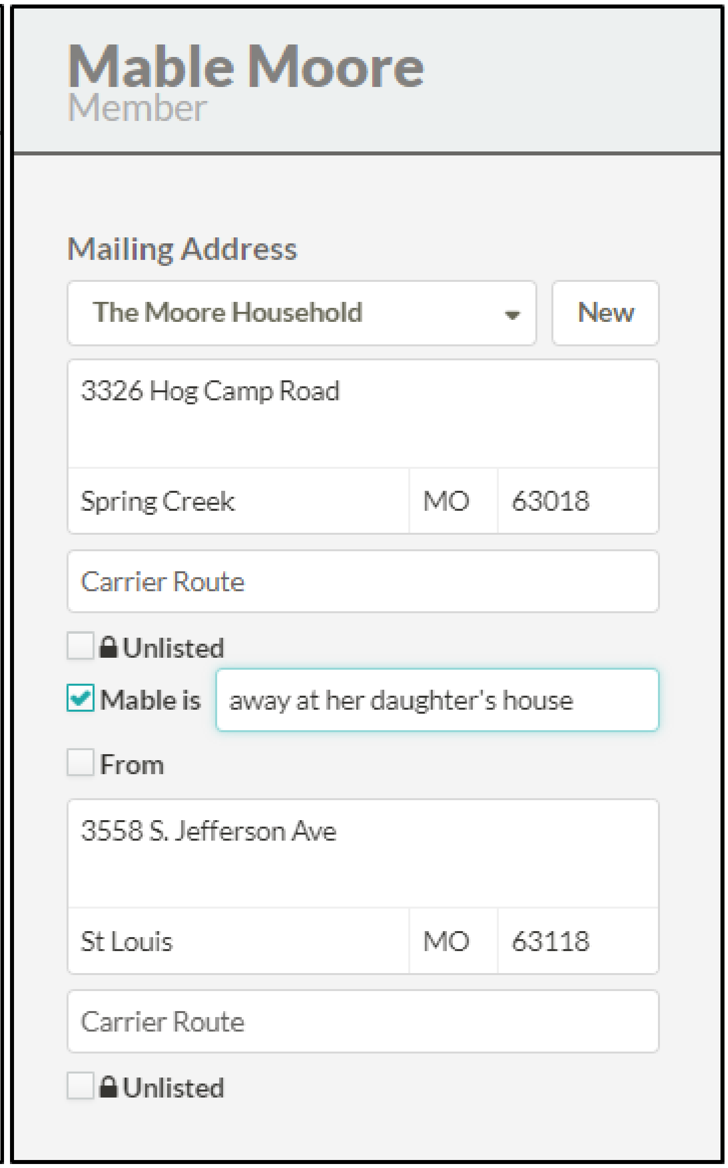
Adding Away Addresses

Some members of your congregation may spend a certain amount of time at a different location that you may want to keep track of. Whether it's snowbirds, college kids, or deployed military, you can add an away address and date range in addition to their regular mailing address. Away addresses can also be toggled on or off manually or set a date for it to expire automatically.

To add an alternate/away address,

1. Select the profile of the individual or household from the People view.
2. Go over to the Mailing Address section and click on the address field to open it up for editing. When you hover over the address area, the entire section will be faintly highlighted. If this is for an individual, you do not want to click the orange name of the household as that will take you to the household record.
3. For individuals, check the box to mark the person as being away. For entire households, click the box stating that the mailing address is different. This will open up other fields for more information on their away status, time period, and location.
4. Next to the checkbox, you can type in a general note about where this person is, or just leave it as simply "away".
5. If you'd like to add a date range for when this person will be away, check the box on the next line.
6. Use the drop-down menus to choose a beginning and ending date for the extent of the person's departure. If this is a yearly occurrence, you can leave the year fields empty for the date range to make the address recurring.
7. If available, you can type in the street, city, state, and zip code information for the away address in the appropriate boxes. Check the Unlisted box if you don't want this address to be printed on directories.
8. When everything looks good, click anywhere in the white space outside of the section and your information will be saved automatically. A message will appear below their mailing address to remind you that the person is currently away and when they will be back.


Martin
The Martin Household
Permanent Address
2072 Half and Half Drive
Bakersville
MO
63027
Carrier Route
Unlisted
My mailing address is different
From
Nov
23
2023
to
Mar
31
2024
12 La Casa Place
Saint Augustine
FL
32080
Carrier Route
Unlisted

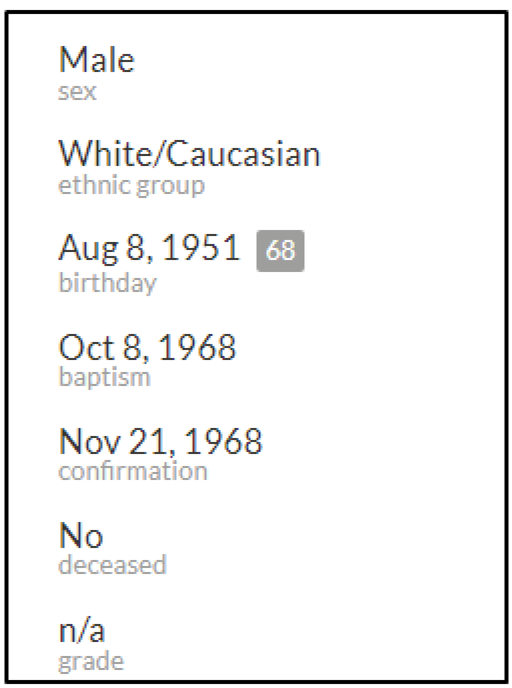

Mable Moore
Member
Mailing Address
The Moore Household
New
3326 Hog Camp Road
Spring Creek
MO
63018
Carrier Route
Unlisted
Mable is
away at her daughter's house
From
3558 S. Jefferson Ave
St Louis
MO
63118
Carrier Route
Unlisted

Updating Personal Information

In a person's profile, users can update personal information for that individual, such as sex, ethnicity, and birthday.

1. From the People's view, click on the individual's name to open their profile.
2. Personal information is located on the right side of the page underneath the profile photo. Click on any of the fields to enable editing.
    - For selection fields, like sex, ethnic group, and grade, use the drop-down menus to choose from the available options.
    - For date fields like birthday, baptism date, confirmation date, or death date, partial dates are accepted. If the date is not known for baptism, confirmation, or death, users can simply check the box to mark them as such.
    - Custom fields will be restricted according to their field type and options entered when created.
3. To save your changes, click anywhere outside the edit box.

Note: Marking a current member as baptized and/or confirmed will update their membership designation as either a baptized member (if only baptized) or confirmed member (if confirmed).



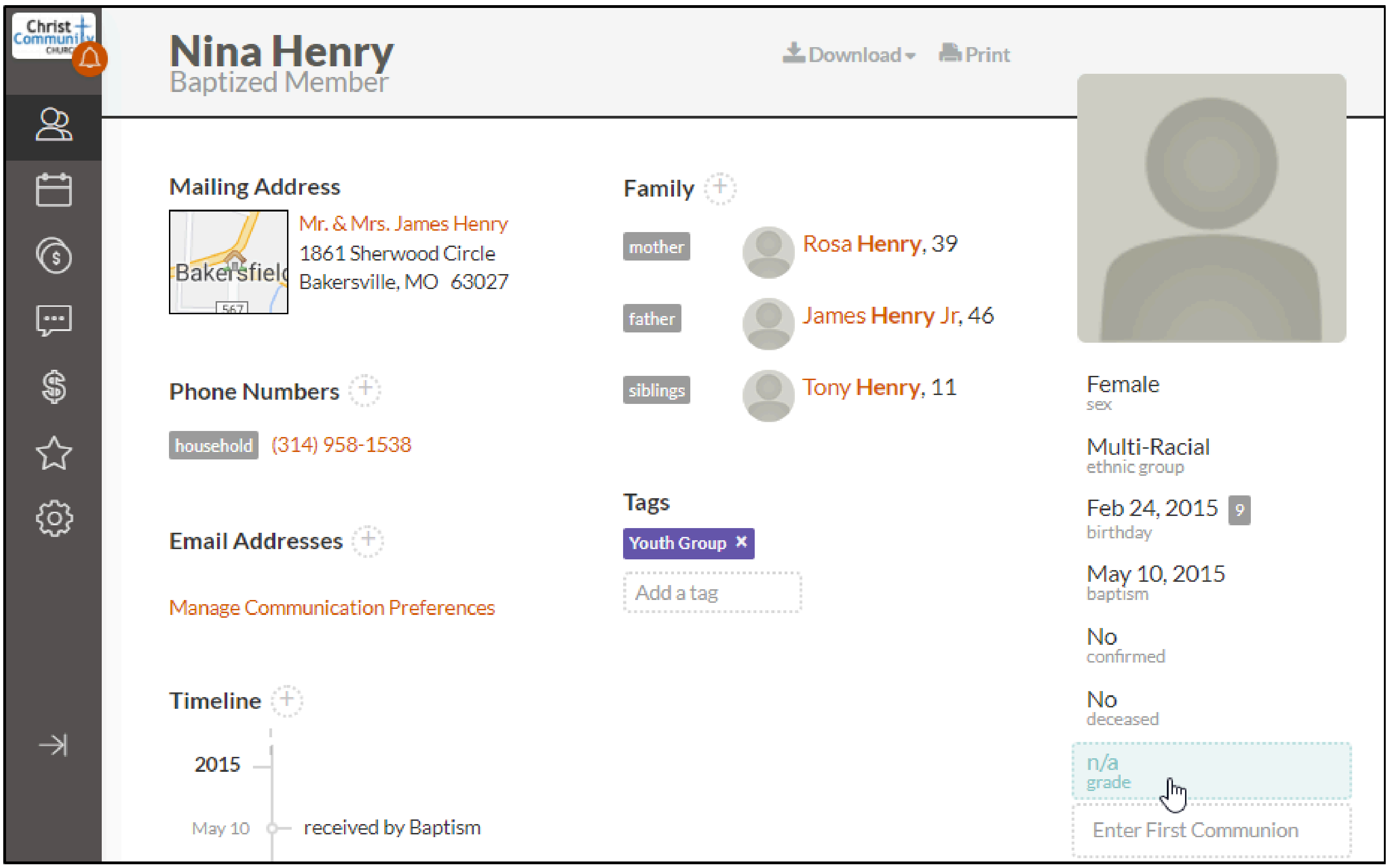
Assigning a Grade to an Individual

Once all respective grades have been created, users can then assign them to students in your church.

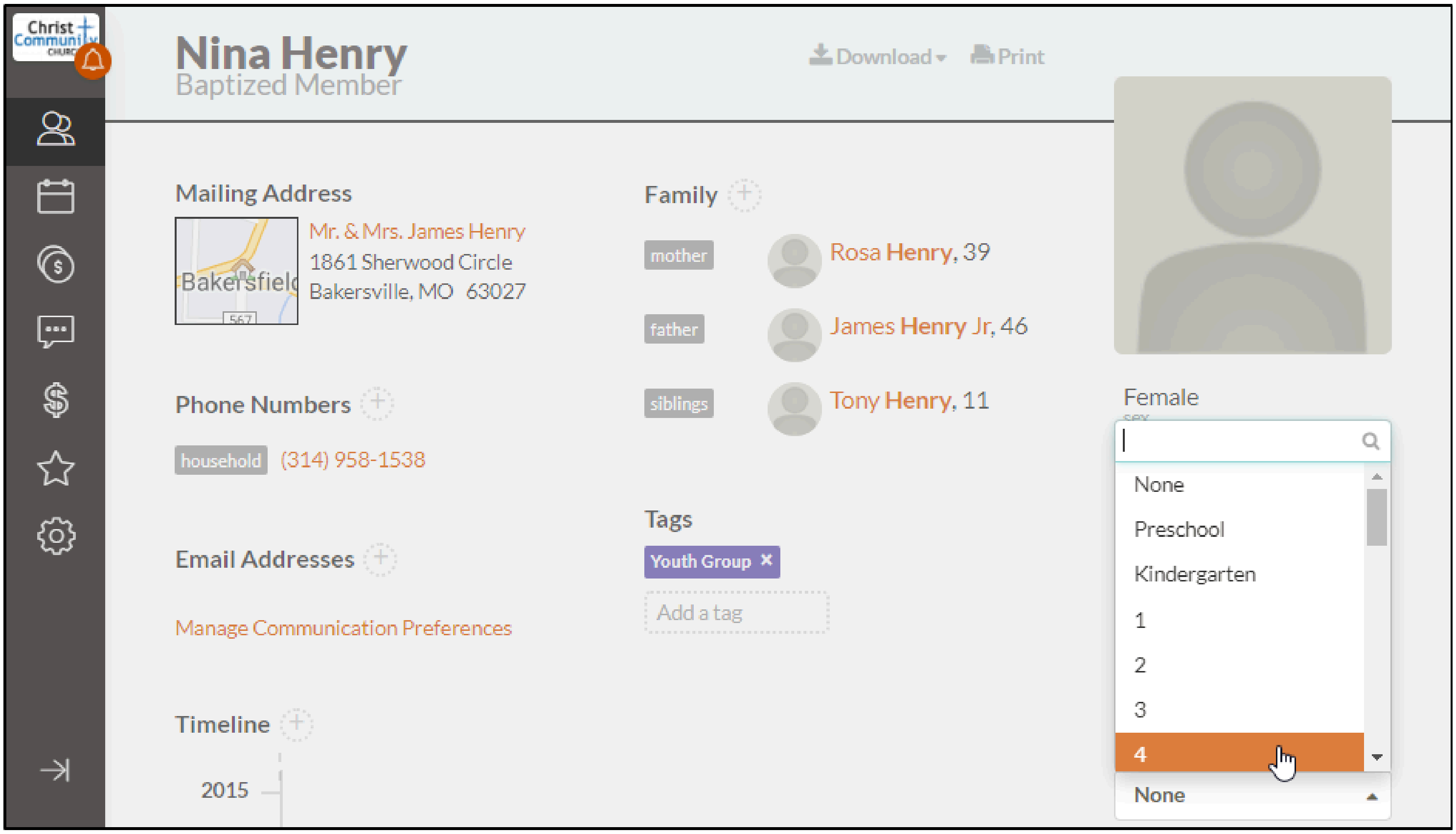
This can help keep track of either a student's school or Sunday School grade, depending on your church's preference.

1. From the People's view, click on the individual's name to open their profile.

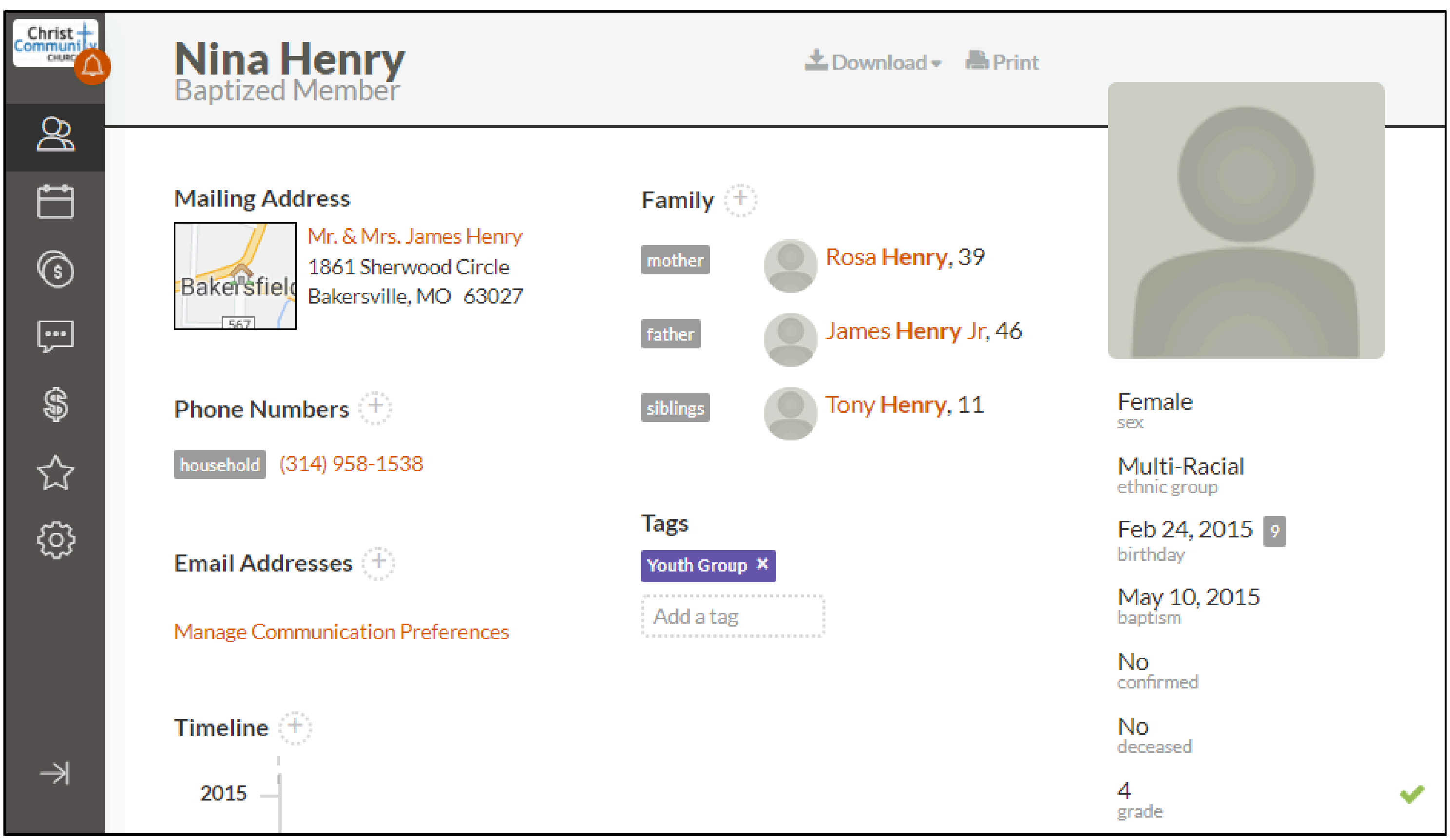
2. Personal information like grade is located on the right side of the page underneath the profile photo. Click on the "Grade" field. If no grade is assigned, it will say "n/a."



3. Use the drop-down menu to select the appropriate grade.



4. Click anywhere outside of the grade drop list to save your changes. A green checkmark will appear briefly.



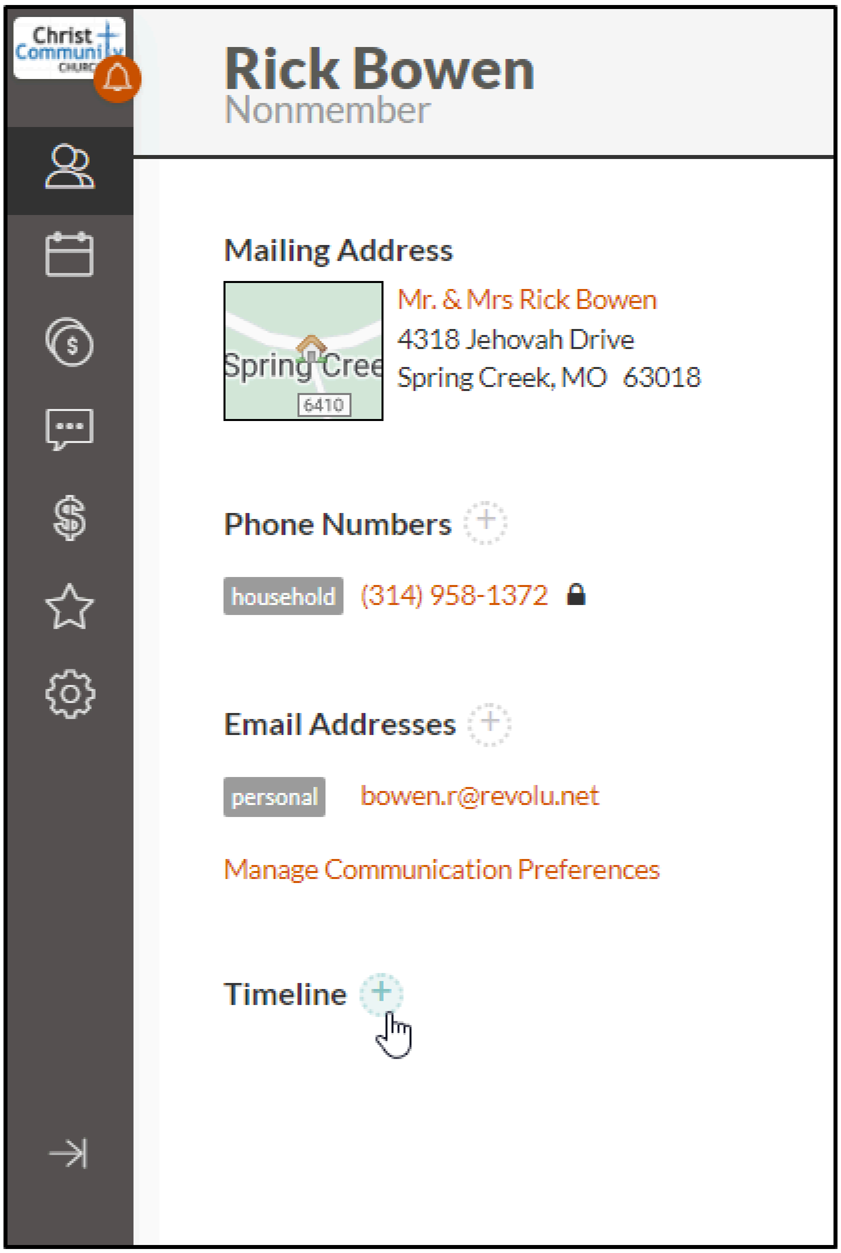
If you are interested in setting up automatic promotion for grades at a specific date each year, please visit our article here.

Updating an Individual's Membership Status

Users can change a person's member or non-member status by entering in a received-by or removed-by entry on the person's timeline on their profile.

To edit a person's membership,

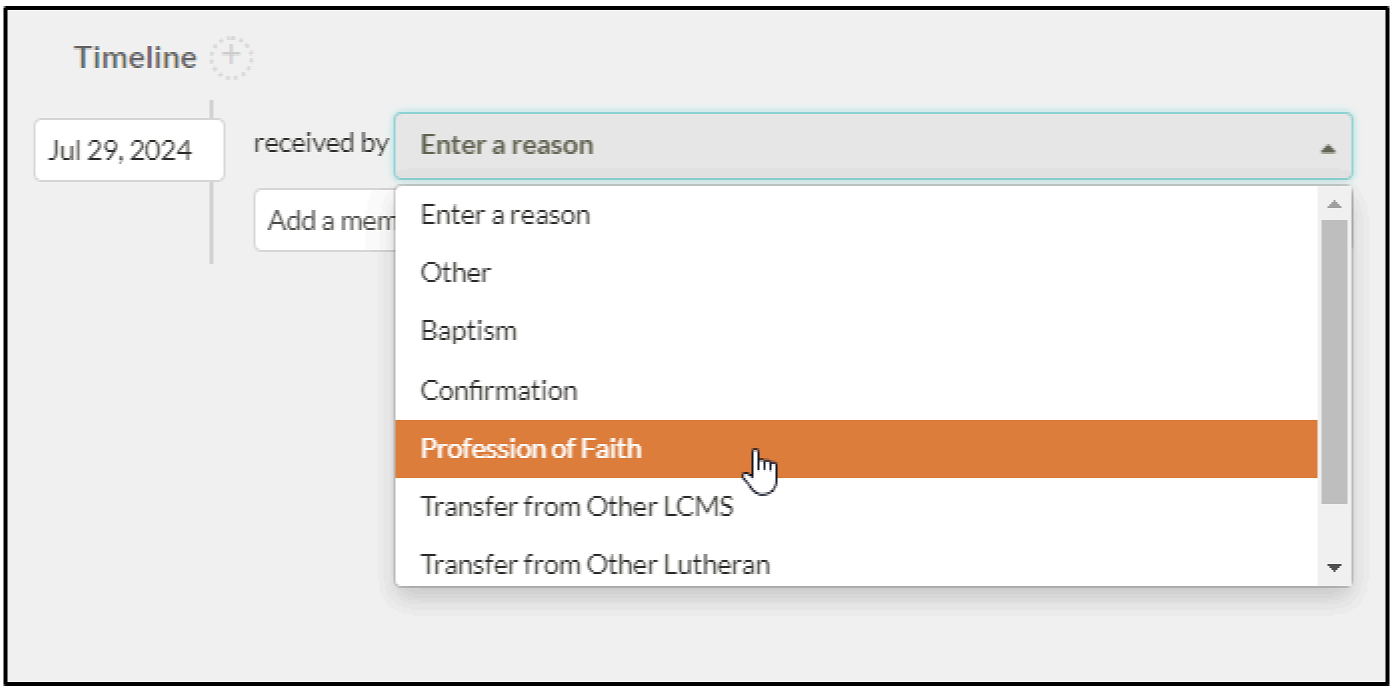
1. From the People's view, click on the individual's name to open their profile.

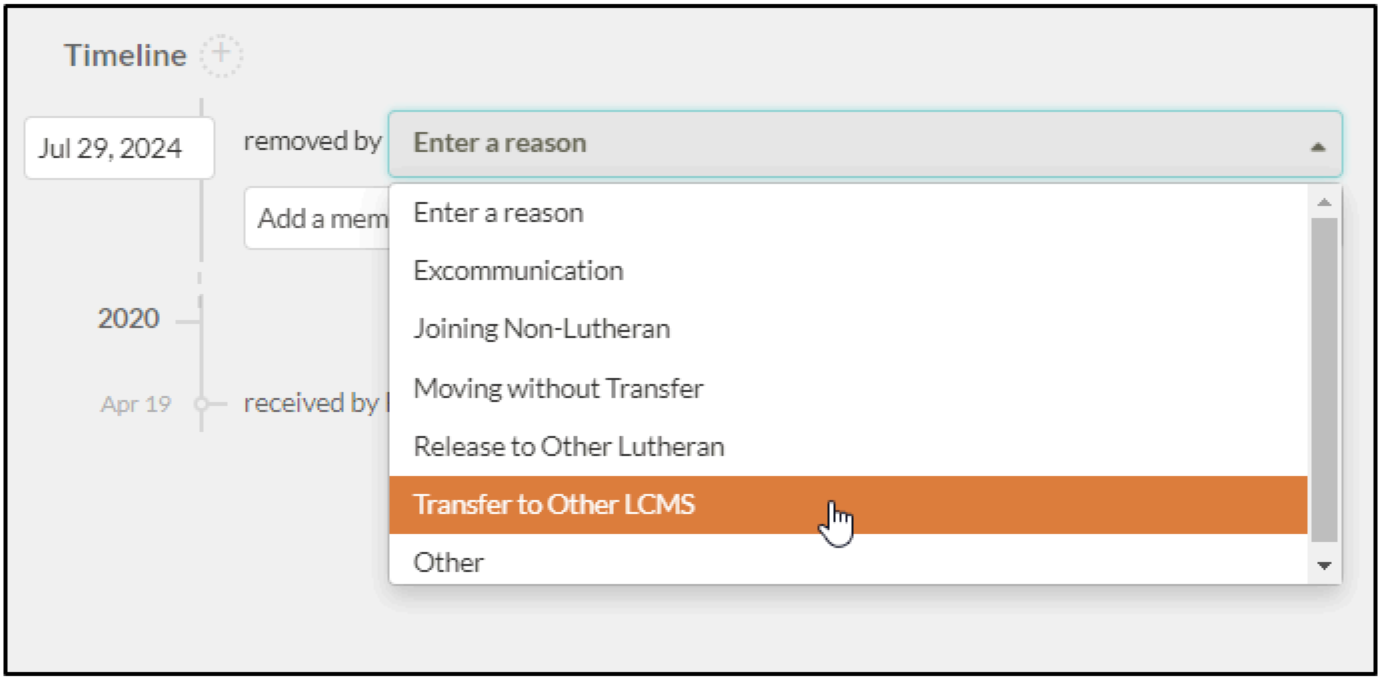


2. Click on the plus sign in the Timeline section to add a new entry.

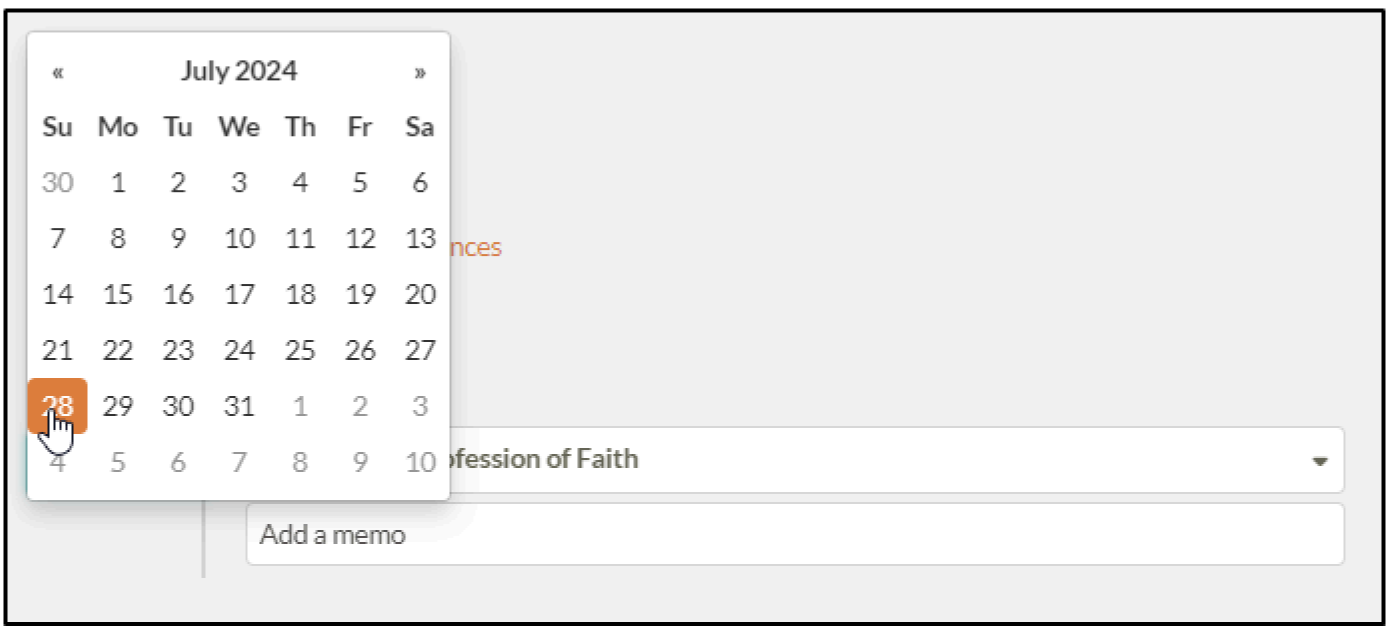
- To make a non-member into a member, click the button to “Receive as Member”.
- To make a member into a non-member, click the button to “Remove from Membership”.

3. A drop-down box will appear; select the reason for the membership reception or removal.

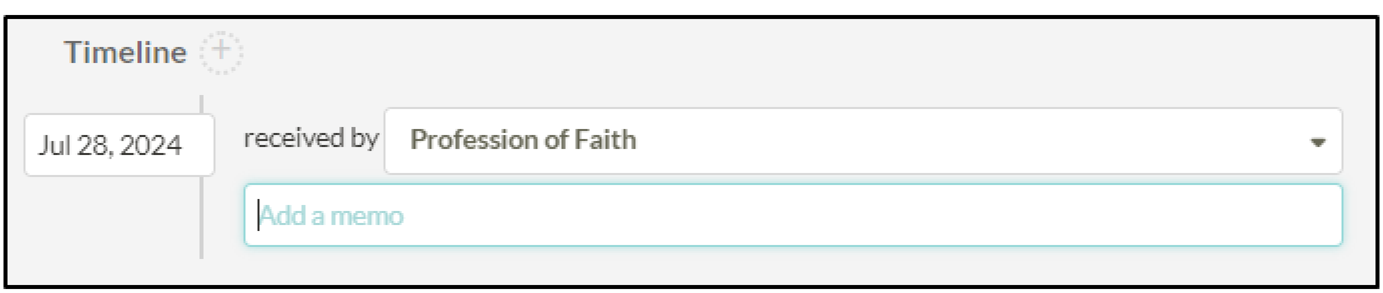


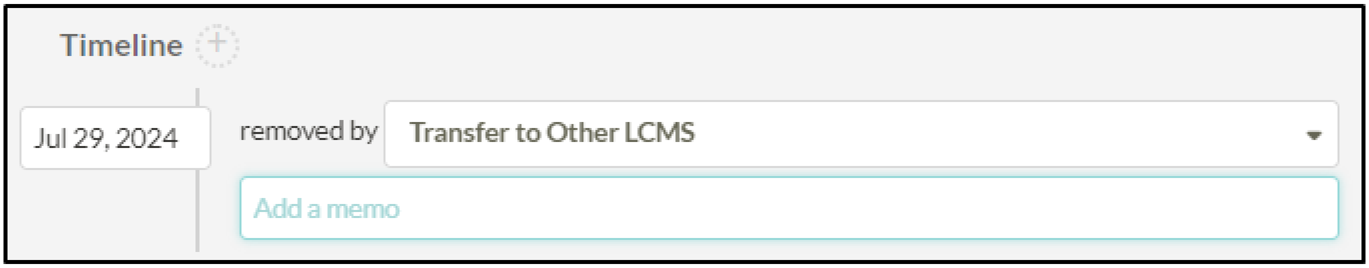


4. Today's date will automatically be added as the date of entry. To change the date, click on the field to open a date selector to choose a different date.



5. If applicable, click on the memo field to add a note relating to their membership change.





6. Click anywhere on the page to automatically save your changes.

- To edit a Timeline entry, click on the entry to reopen it for editing.
- To delete a Timeline entry, hover over the entry and click on the minus sign to delete.

Note: For the integrity of historical data, it is only recommended to delete entries if they are incorrect. If a person was a member for any length of time, please add a removal reason instead of deleting their membership reception entirely.

Updating Addresses

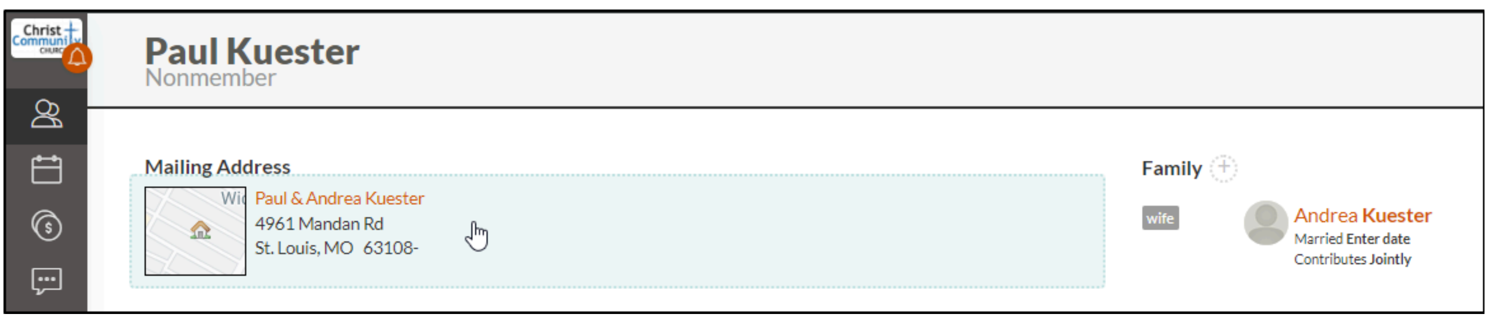
When a person or family moves, you'll want to update the address information in their household record to maintain accuracy for your directory and label reports.

If you want to keep the current address but add an additional address, you may instead want to add an away address to their household or individual profile. For more information on adding away addresses, please visit this article.

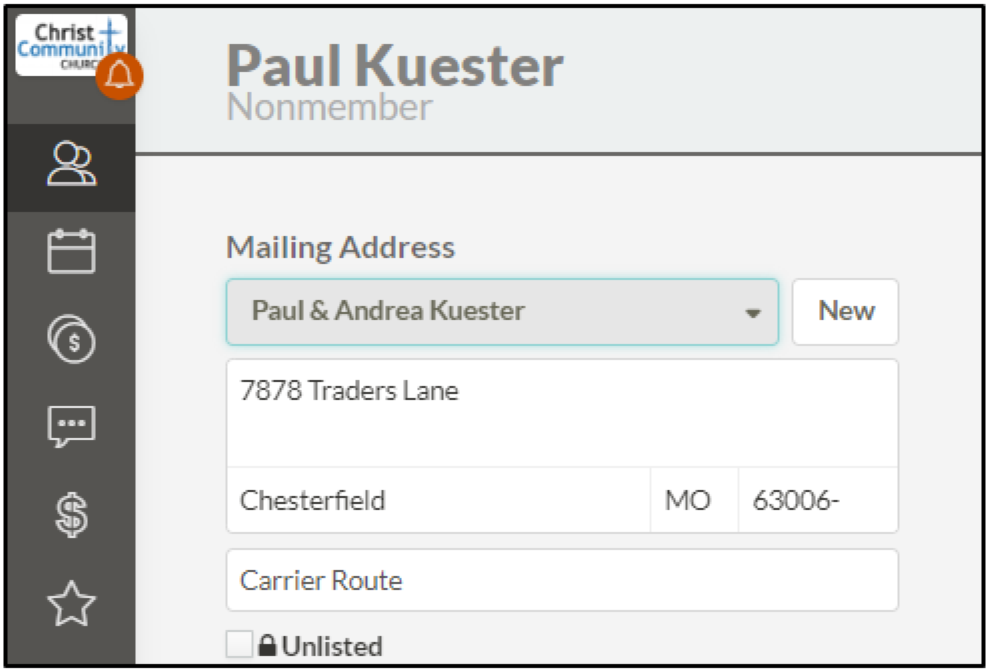
To add or edit a household's address,

1. Select the profile of the individual or household from the People view.

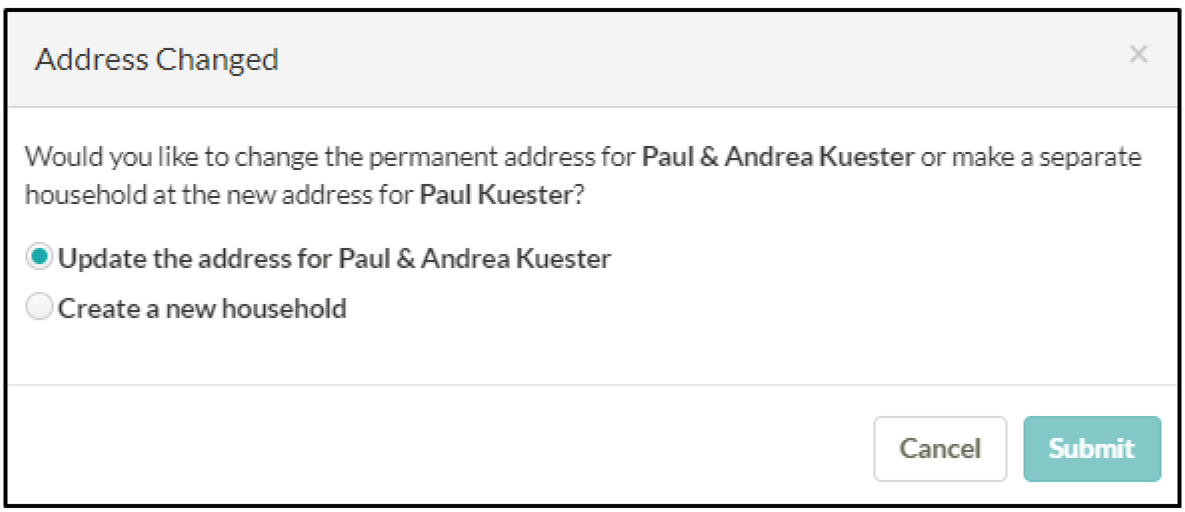
2. Click the Mailing Address (for individuals) or Permanent Address (for households) section to open it for editing. The section should highlight in a faint blue when you hover over it.



3. Edit the address as you need. If the family would like their address to be private, check the box to unlist it.



4. Click anywhere in the white space on the record to automatically save your changes. If this change was done from an individual's record, a window will appear asking if the address should be updated for the entire household or if a new household with the changes should be created for only this person.



Entering a Marriage

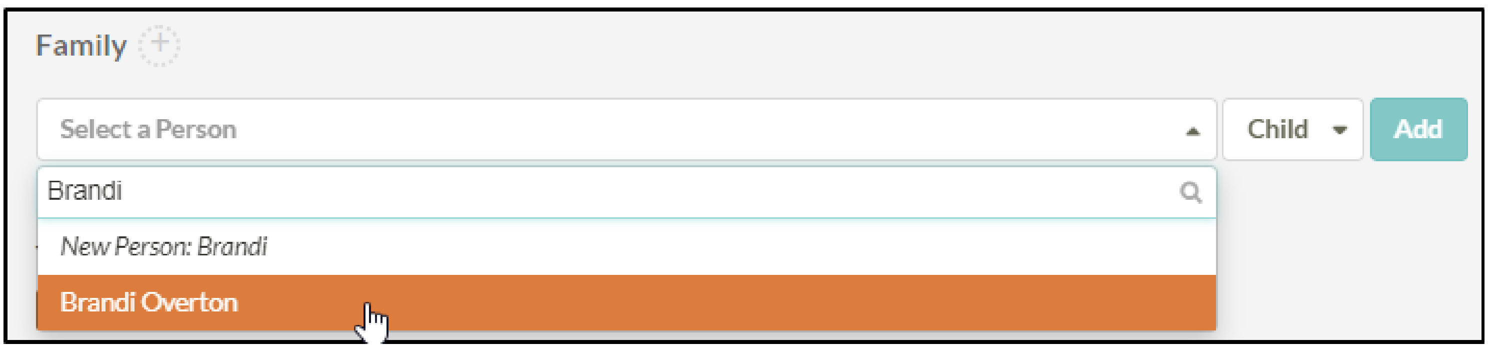
When two people get married, you'll want to mark the relationship on your site and edit their giving unit status as well.

To enter in a marital relationship,

1. Find and open the person record for a member of the couple.

2. Click the plus sign to the right of the Family section heading to start a new relationship entry.

3. If the other half of the couple already has a person record in the system, use the drop-down menu to find their name. If their record has not been created, type in the person's first and last name and click on the entry proceeded by the string "New Person:".



4. Use the drop-down menu to select the Spouse option.

5. Click the "Add" button to add the new relationship.

6. Directly under the spouse's name, click Enter Date to add a wedding month, day, and/or year, if known.

7. Directly under the wedding date, review the couple's contribution status. If the couple will be giving as a joint unit from now on, leave them as giving jointly. If the two want to give separately, click the Jointly option to edit their giving status.

8. Click anywhere in the white space on the record to automatically save your changes.

It's important to note, all offerings given by a single person before the relationship was changed, will still be attributed only to that single person. All offerings given by the couple after this relationship was added, will be attributed to both. Updating marriage information may result in a couple receiving contribution statements both for themselves and for their joint giving.

If you have concerns over couples receiving multiple contribution statements, please reach out to CTS to merge offerings however you need.

Entering a Divorce

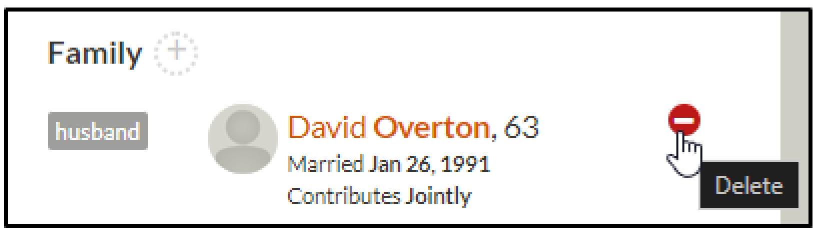
If two of your members get divorced, you'll need to enter their relationship change to avoid joint contributions and awkward anniversary lists in the future.

Before adding a divorce, you'll want to take note on what the couple's envelope number is. This number will disappear when the divorce is added so you may need to add it again to the spouse who will retain the number.

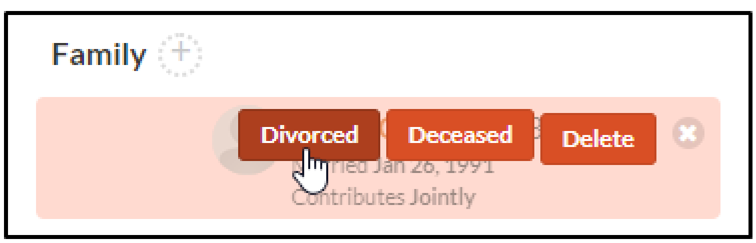
To edit a marriage,

1. Find and open the person record for a member of the couple.

2. Hover over the relationship and click on the faint minus sign that appears.



3. Choose the "Divorced" button. This will unassign any envelope assigned to the couple from both persons as they will be giving separately from now on.



4. Directly under the spouse's name and their wedding date, click Enter Date to add a divorce month, day, and/or year, if known.

5. Click anywhere in the white space on the record to automatically save your changes.

6. Reassign separate envelopes to the two, if needed.

Note: All offerings given by the couple, before this relationship was edited, will still be attributed to both givers, and all offerings given by a single person after the relationship was changed, will be attributed only to that single person. Updating marriage information may result in a couple receiving contribution statements both for themselves and for their joint giving.

If you have concerns over couples receiving multiple contribution statements, please reach out to CTS to move offerings however you need.

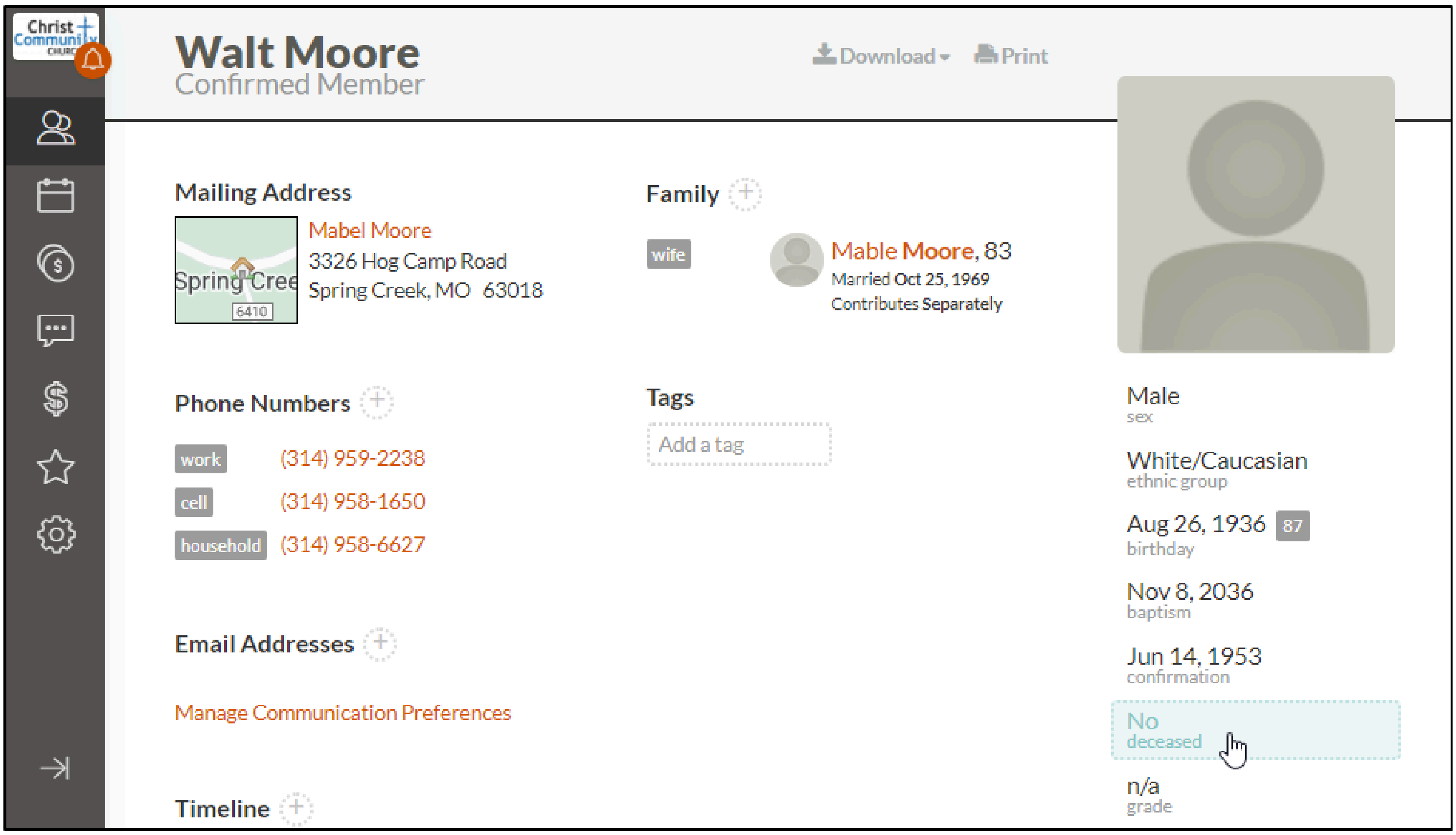
Entering a Death

If a person dies, you can add their death on either their person record or from their widow(er)'s record.

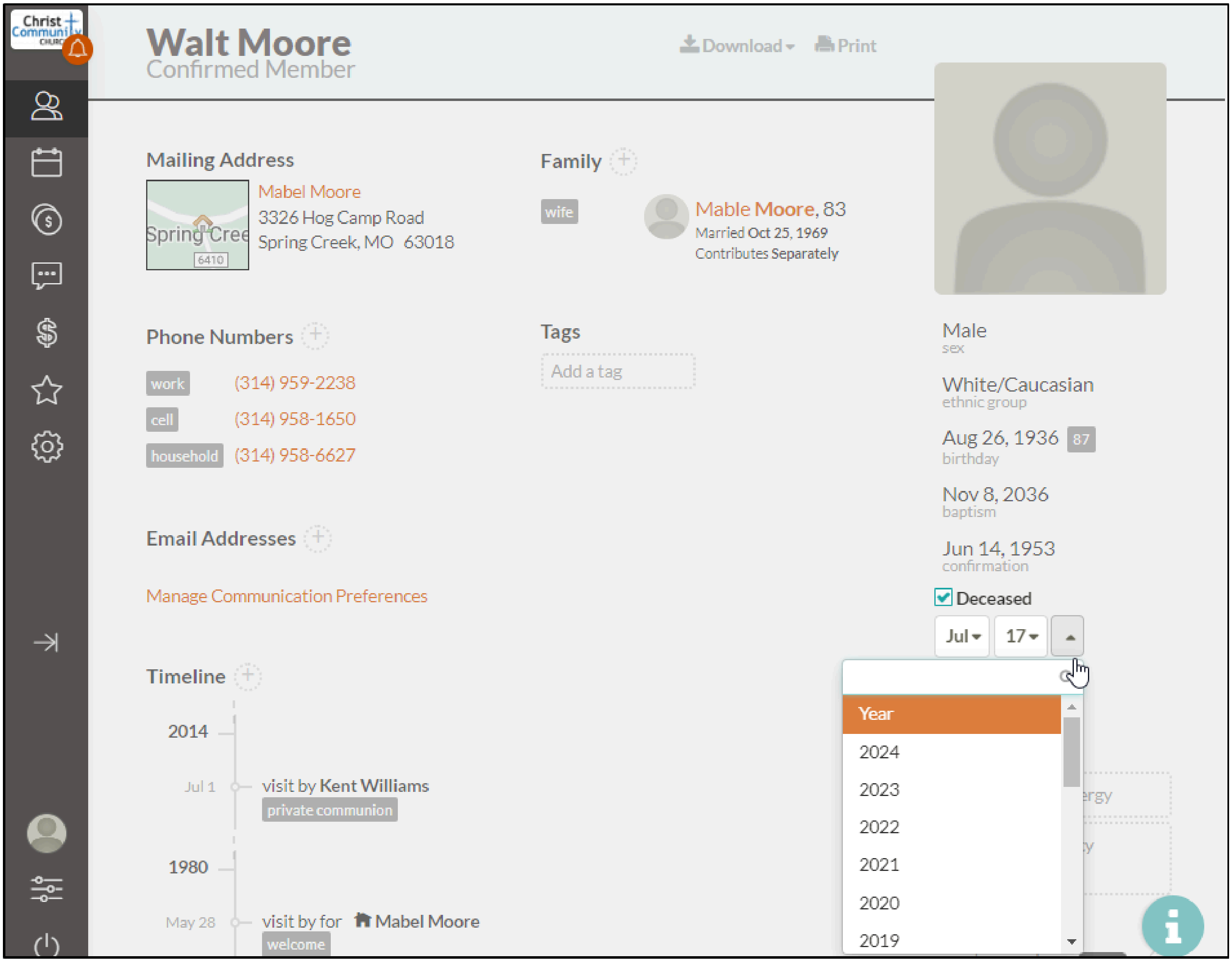
To mark someone as deceased on their own record,

1. Click on the name of the individual to open that person's profile.

2. To the far right, find and click the "deceased" field to open it up for editing.



3. Check the box marking them as Deceased and use the drop-down menus to add a death date, if it's known.



4. Click anywhere outside of the edit field to save your changes. They will be marked as a deceased member.

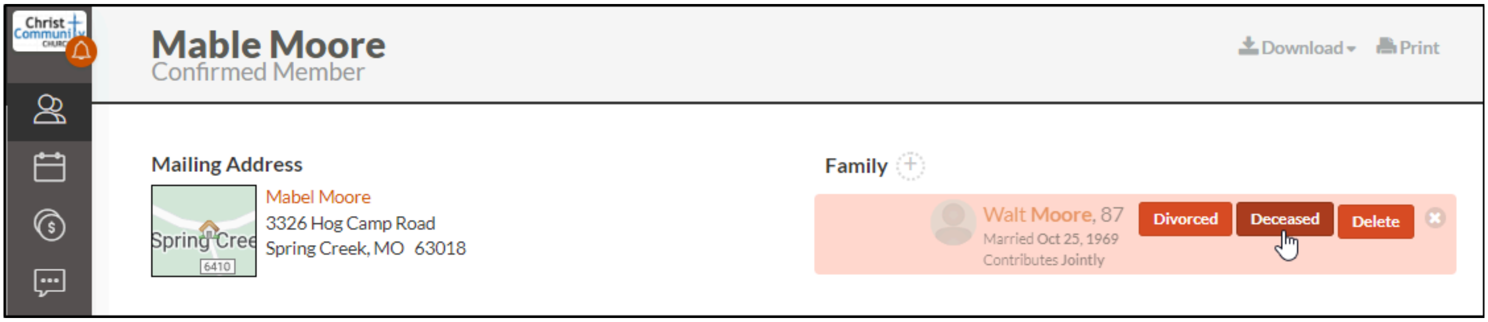
If a death has been entered in error, click the "deceased" field again and uncheck the box marking them as Deceased.

To mark someone's spouse as deceased,

1. Find and open the person record for the surviving spouse.

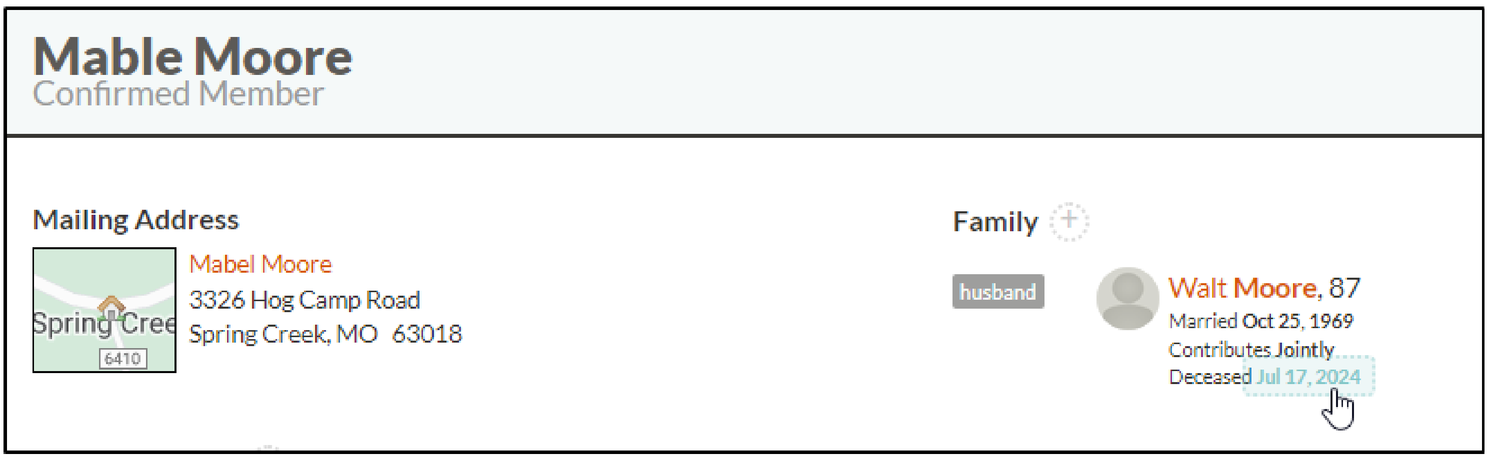
2. Hover over the relationship and click on the faint minus sign that appears.

3. Choose the "Deceased" button.



- Note: This will **not** unassign the envelope assigned to the couple and the couple will continue to give jointly unless the surviving spouse is marked as giving separately.
- To mark them as giving separately, click the Jointly option under the marriage date to edit their giving status.

4. Directly under the spouse's name, wedding date, and giving status, the death date will automatically be filled in with the current date. Click the date to edit it however you need.



5. Click anywhere in the white space on the record to automatically save your changes.

Note: All offerings given by the couple, before they are marked as giving separately, will still be attributed to both, and all offerings given by the surviving spouse after the relationship was edited, will be attributed only to that single person. Updating marriage or death information may result in a couple receiving contribution statements both for themselves and for their joint giving.

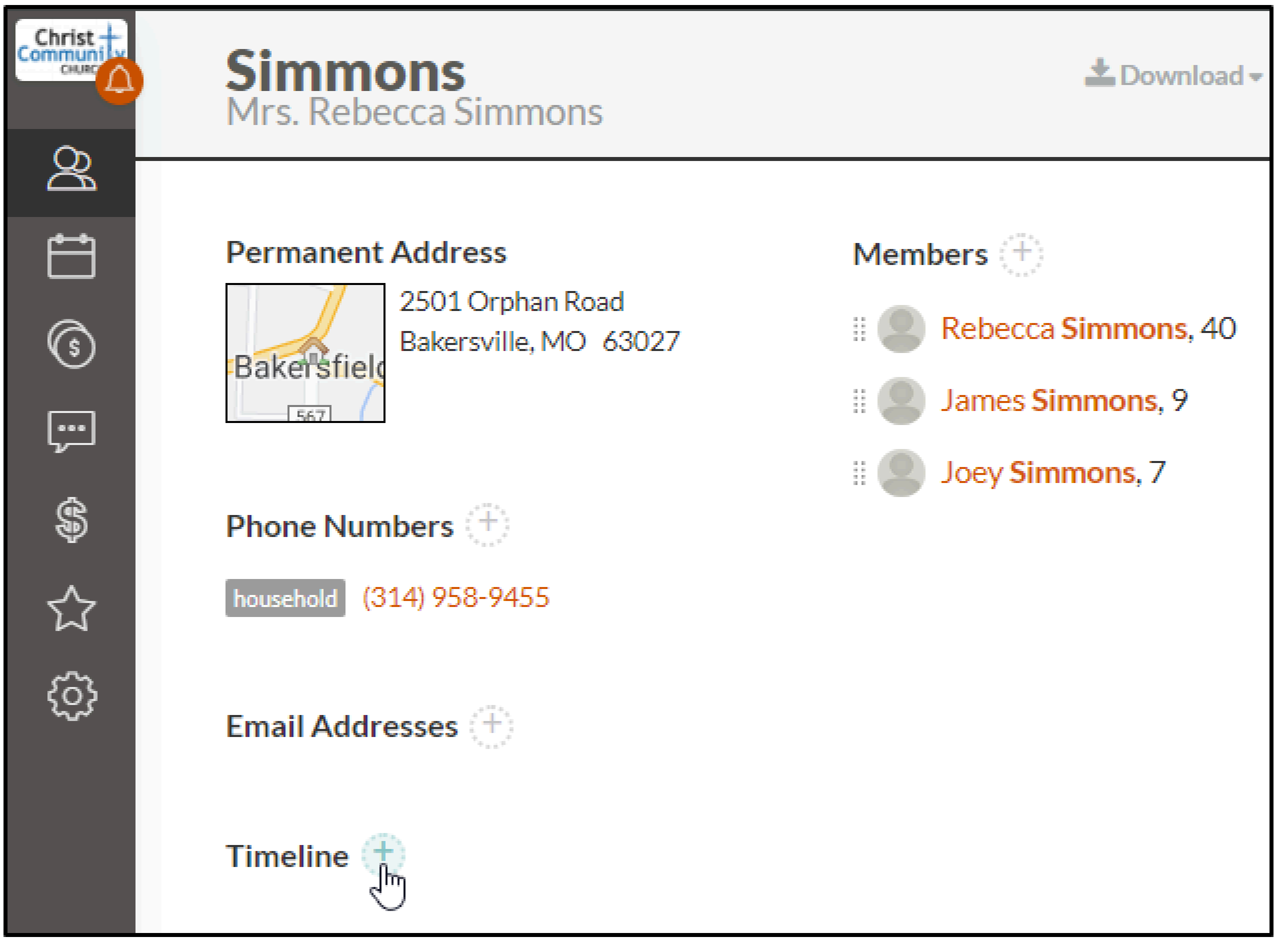
If you have concerns over a person receiving multiple contribution statements, please reach out to CTS to move offerings however you need.

Adding, Editing, and Deleting Notes in Profiles

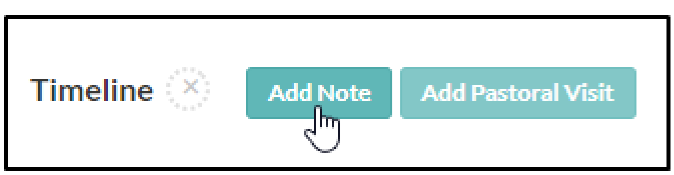
Users can add notes and pastoral visits to both household and individual profiles.

1. From the People's view, click on the individual or household name to open the profile.

2. The Timeline section is located on the left of the page underneath the Email Addresses section.

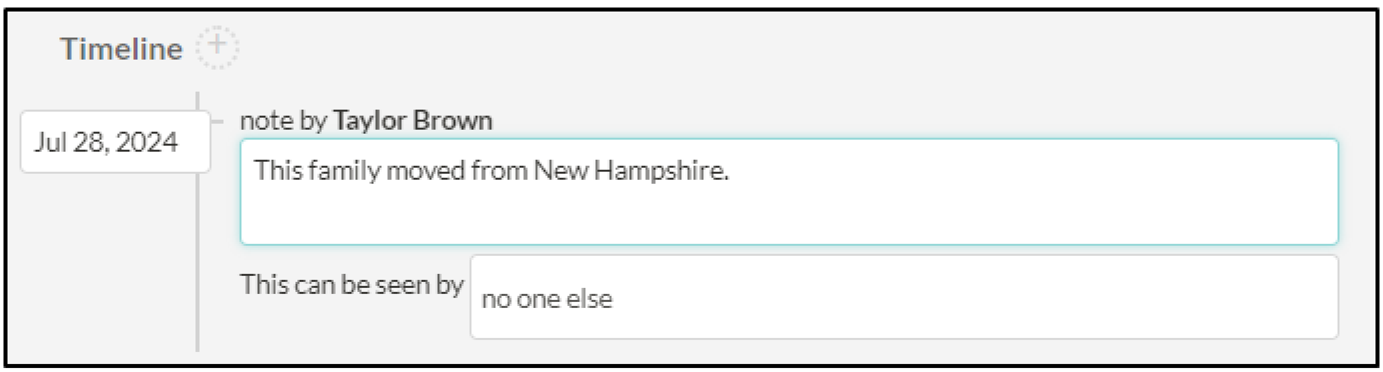


3. Click the plus sign next to the heading and click "Add Note".

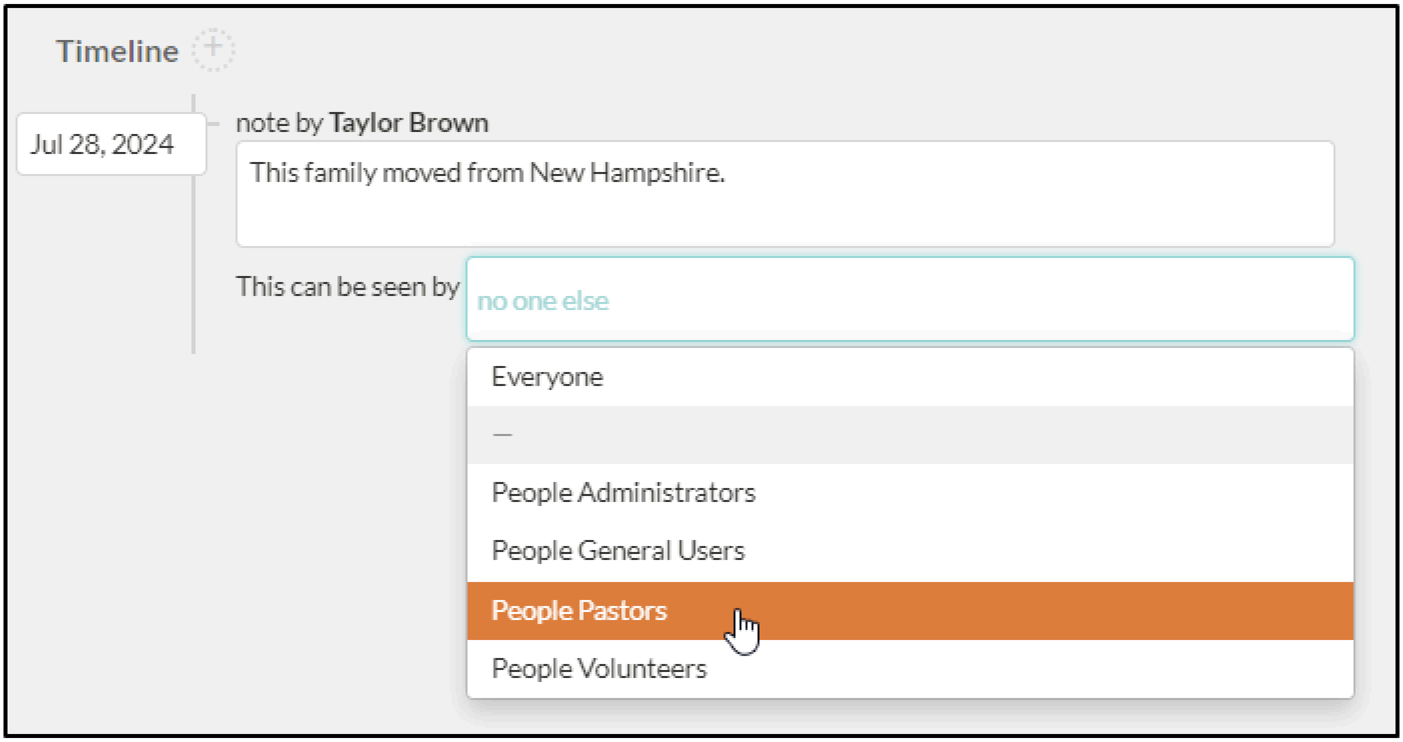


4. Choose a date for the note to appear on the Timeline.

5. Click inside the first text box to enter in content.

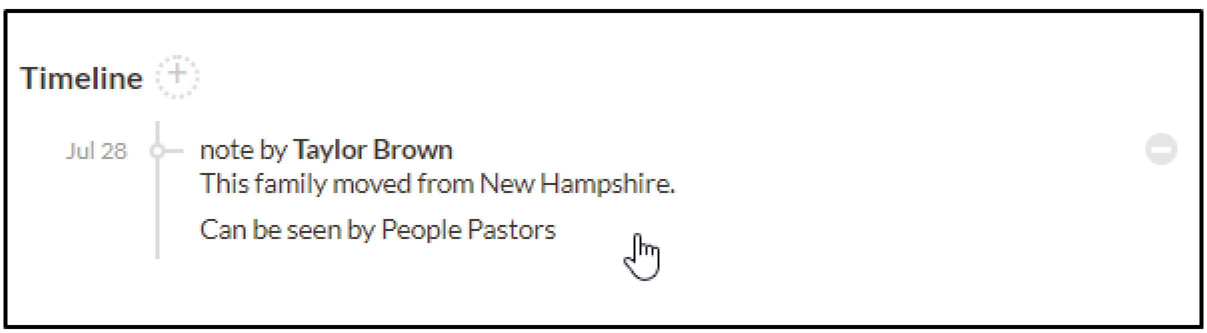


6. Click inside the second text box to select what People-related roles can see this note. Leaving this box blank will allow only the current user to view it.

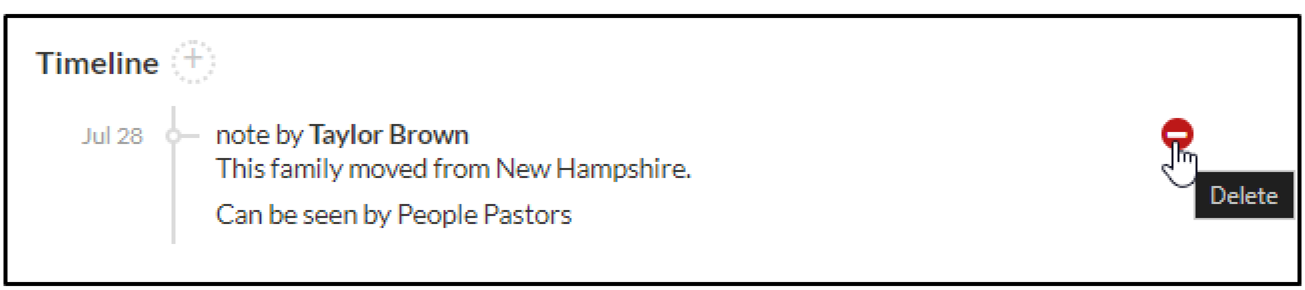


7. Click outside the note box to return to the normal profile view; your changes will be saved automatically.

- To edit a note, click the note to edit its contents. and click anywhere outside the edit box to save your changes.



- To delete a note, hover over the note name, click on the minus sign, then click on the red "Delete" button to confirm your deletion.



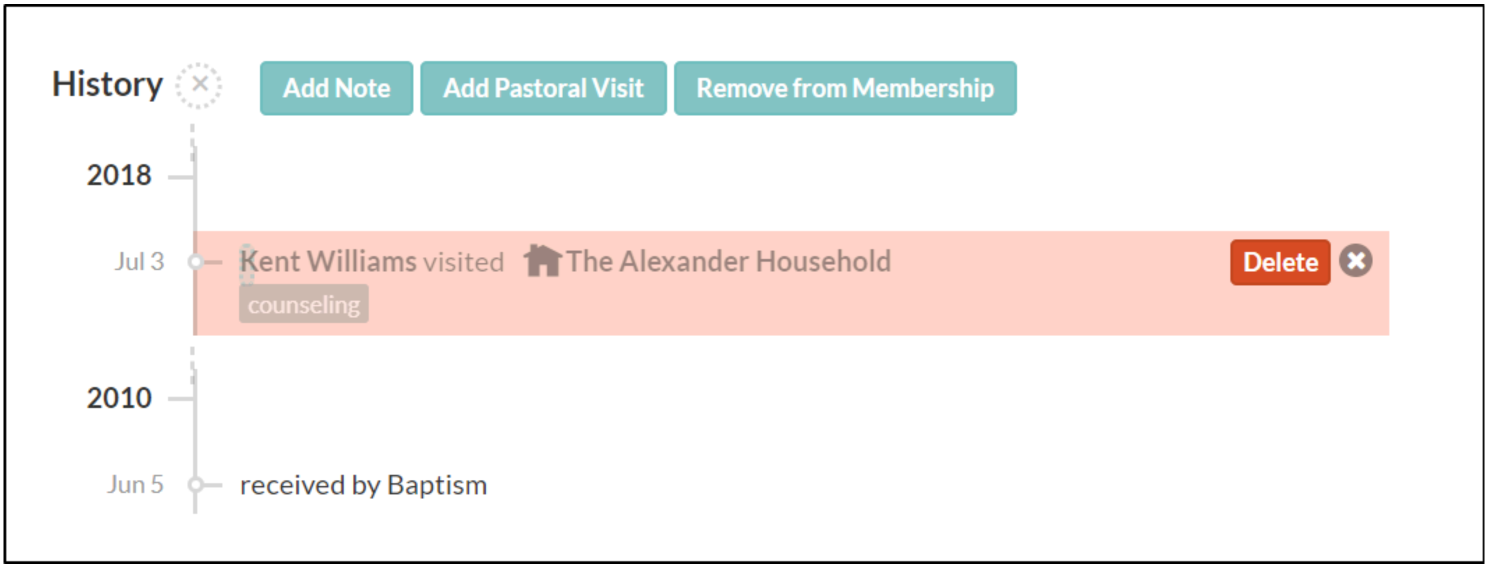
Adding, Editing and Deleting Pastoral Visits in Profiles

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's to open the profile.
2. Scroll down to the Timeline 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 edit 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.


History
Add Note
Add Pastoral Visit
Remove from Membership
2018
Jul 3
Kent Williams visited
The Alexander Household
counseling
Delete
2010
Jun 5
received by Baptism

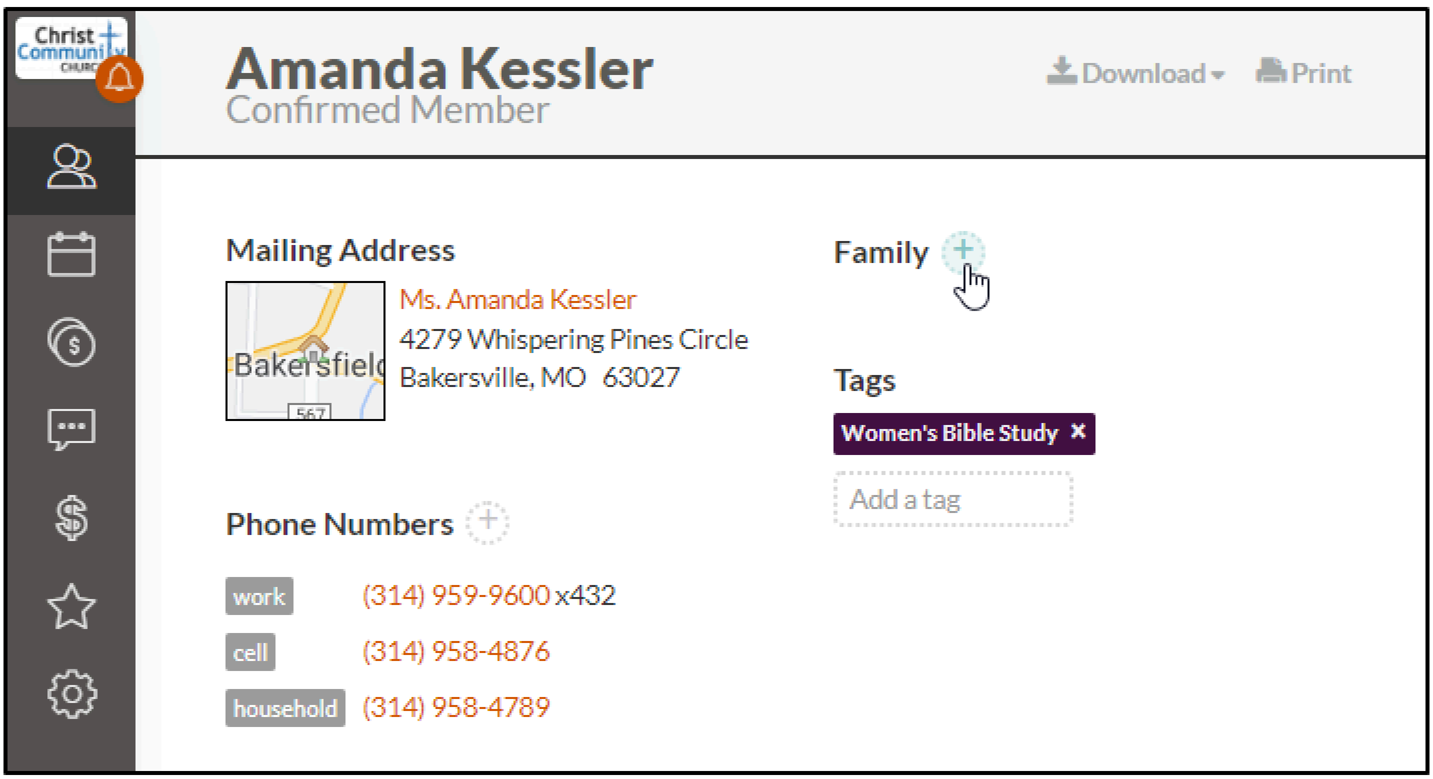
Adding and Deleting Relationships

Different relationships between different person records can be designated from the profile of one of the related members. This would also be how to add marriages as well.

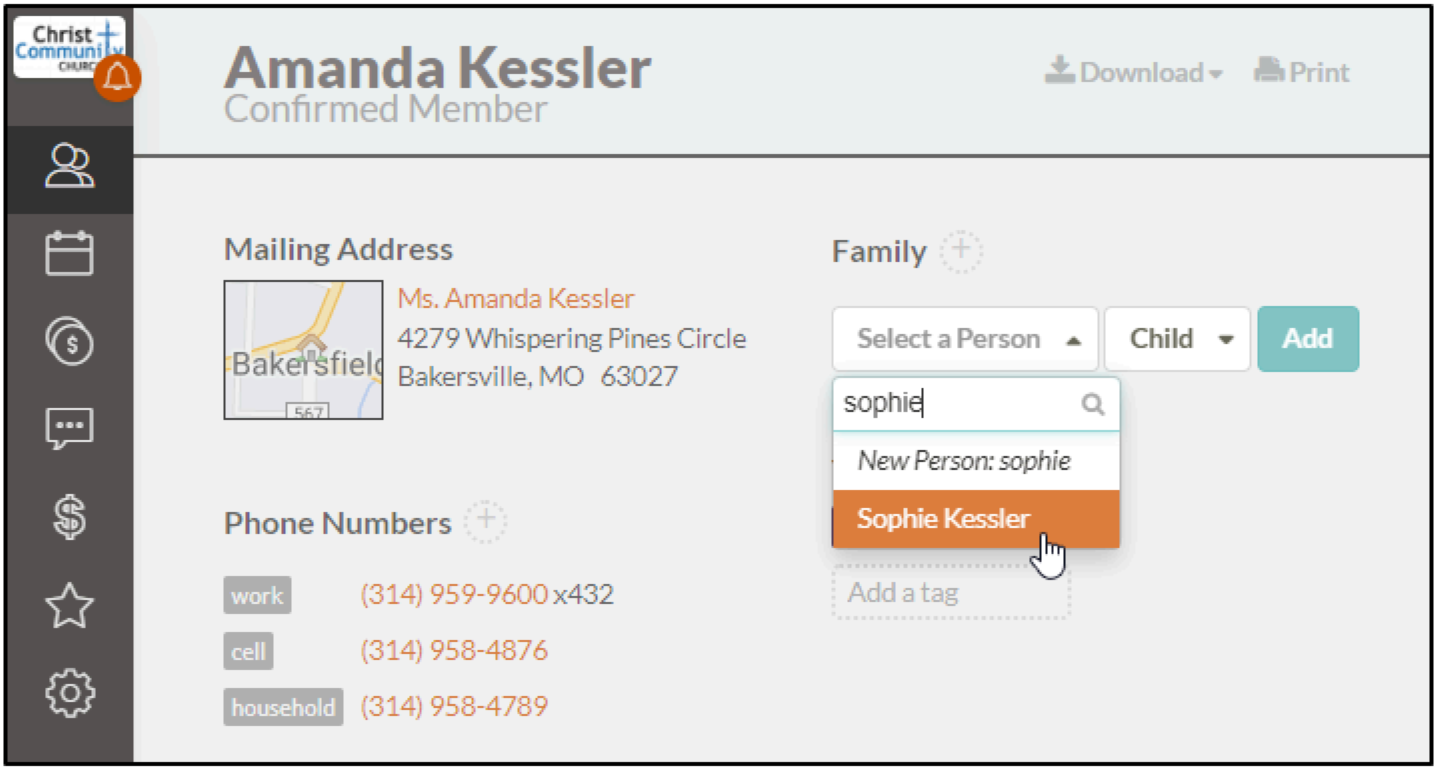
To enter in a new relationship link,

1. Find and open the person record for one side of the relationship.

2. Click the plus sign to the right of the Family section heading to start a new relationship entry.

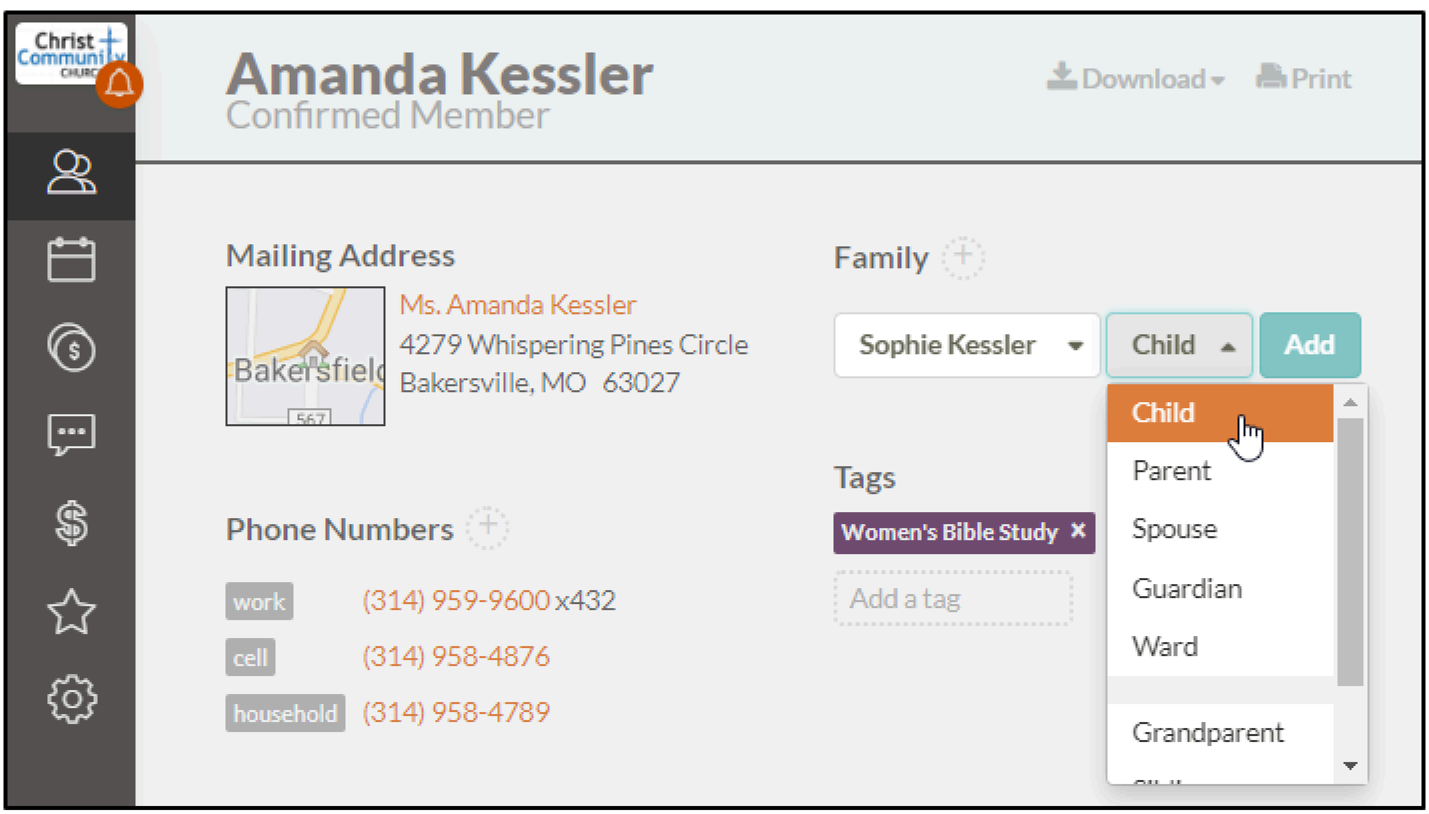


3. If the other half of the relationship already has a person record in the system, use the drop-down menu to find their name. If their record has not been created, type in the person's first and last name and click on the entry proceeded by the string "New Person:".



4. Use the drop-down menu to select the appropriate relationship option.

5. Click the "Add" button to add the new relationship. This relationship will now appear on both records.



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

To remove a relationship,

1. Hover over the relationship in the Family section and click the minus sign to the right of it.

2. Depending on the nature of the relationship, there may be multiple options. Click the "Delete" button to remove the relationship entirely.

Note: Besides relationships manually added to a person record, you may also see some relationships appear that are based on manual relationship links. These are called "inferred relationships" where one relationship is based off of another existing relationship.

To delete an inferred relationship, you will need to delete the relationship that created the inferred relationship.

Adding or Removing Tags within a Profile

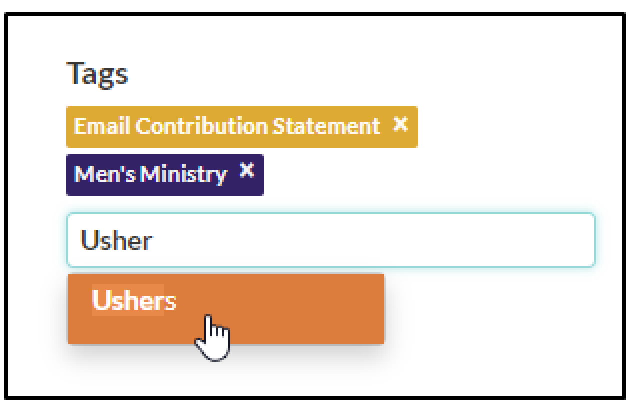
When you are editing only one person's information, adding Tags from that person's profile is more convenient than using the Mass Add/Remove Tags feature.

To add a tag when on a person or household record,

1. From the People's view, click on the individual's name to open their profile.

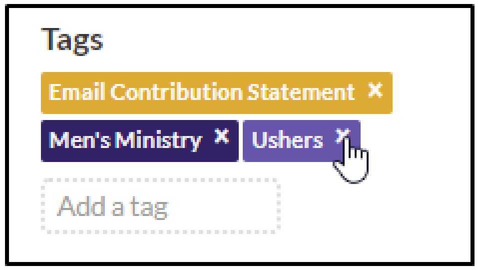
2. The Tags section is located around the center of the page underneath the Family section.

3. To add a new tag, click inside the "Add a tag" text box and type in the tag name.



- If the tag already exists, choose the tag from the drop-down menu to add it.
- If the tag doesn't exist, press the Enter key to add it.

- To remove a tag, click the "x" on the tag you wish to remove.

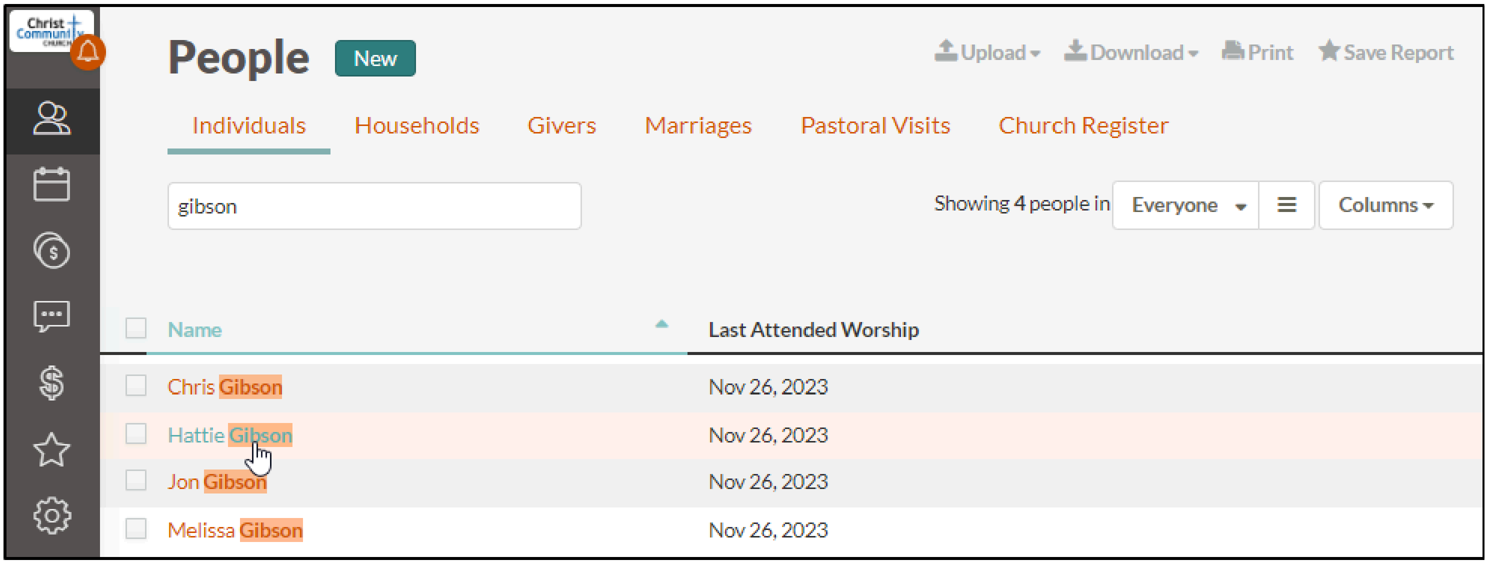


Viewing an Individual's Attendance

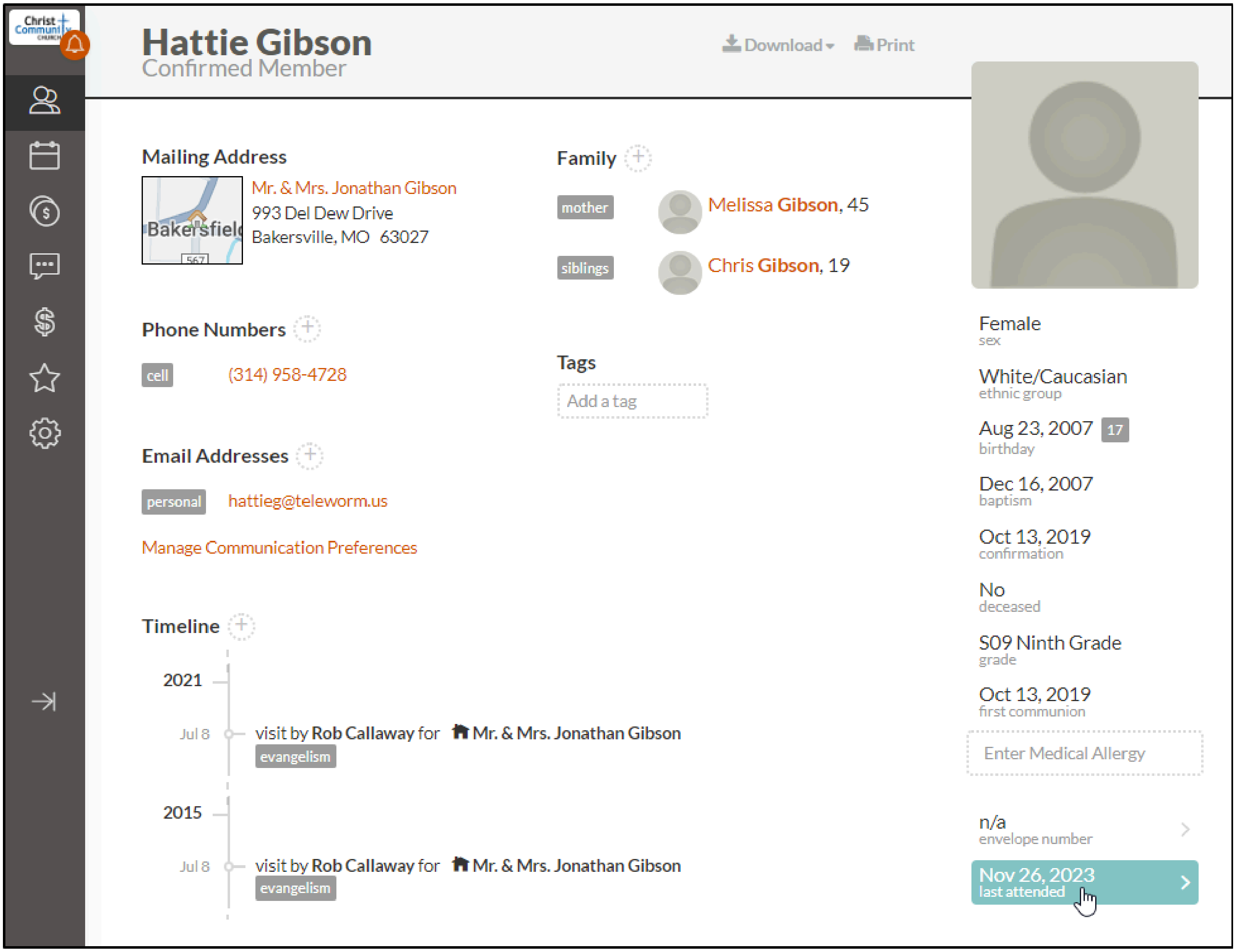
A person's profile contains a link to view his or her attendance history that users can use to reference events this person has attended.

To view a person's attendance history from their individual record,

1. Go to the People view and click on the individual's name to open the profile.

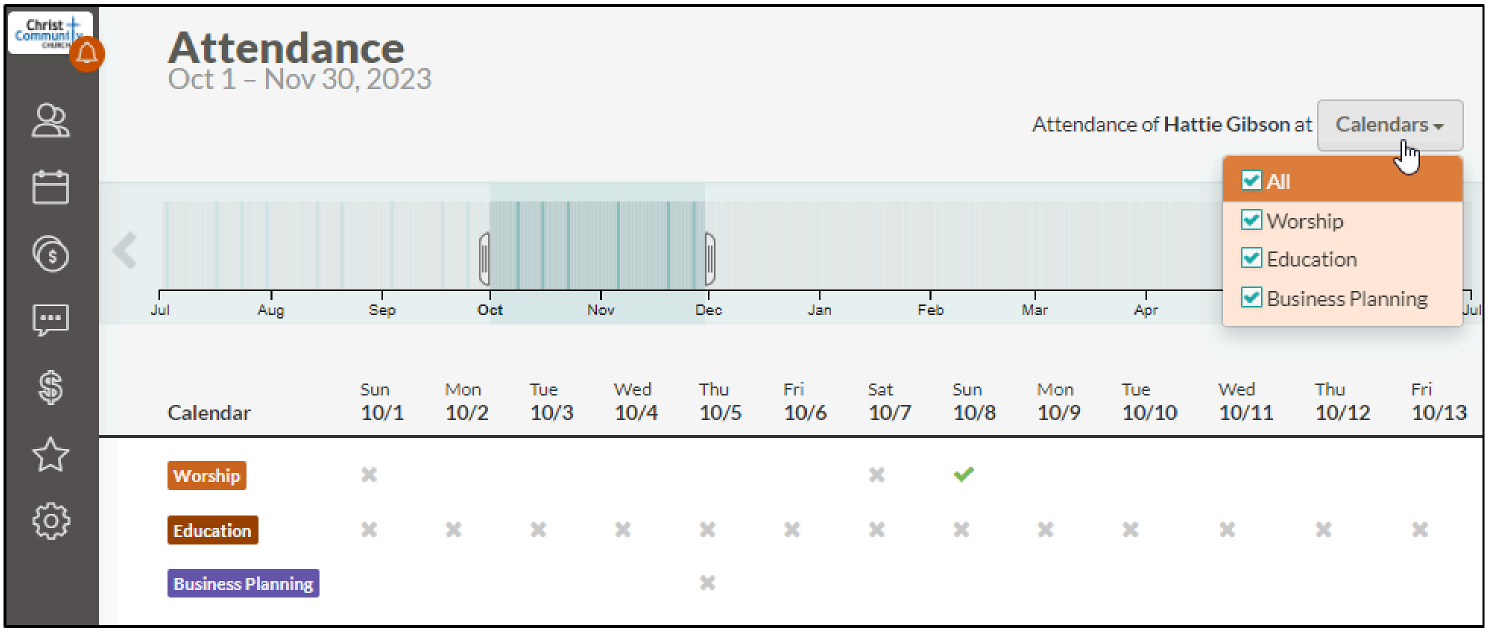


2. On the right side of the profile, click on the "Last attended" link to open the personal attendance page. This page displays the latest events this person has attended.



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.

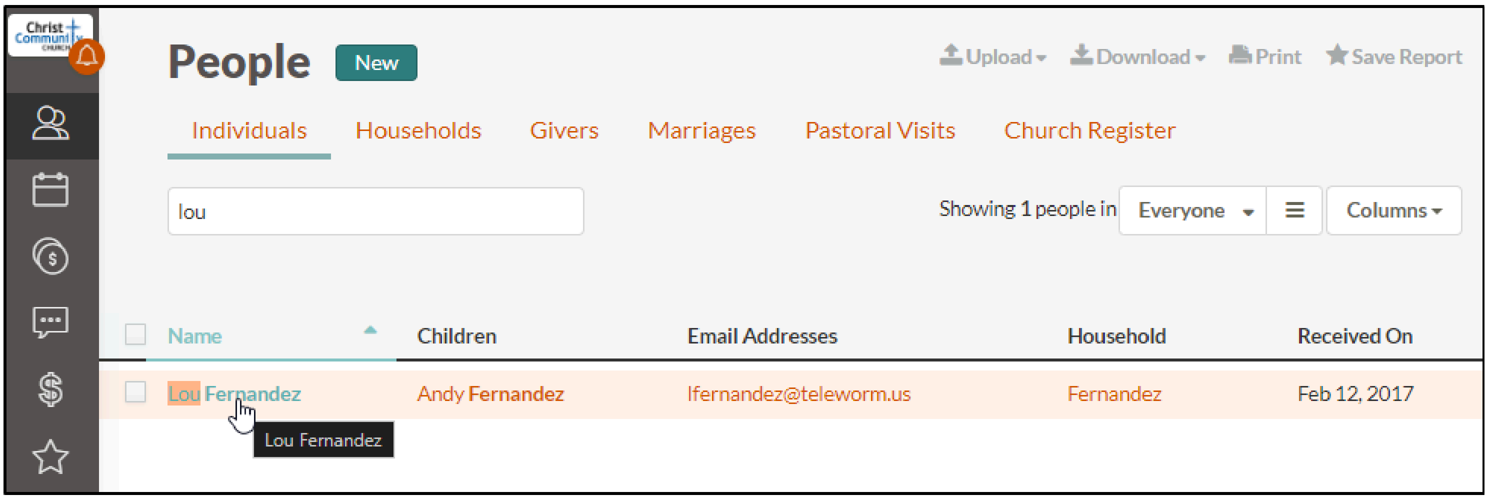

Attendance
Oct 1 – Nov 30, 2023
Attendance of Hattie Gibson at
Calendars
All
Worship
Education
Business Planning
Jul
Aug
Sep
Oct
Nov
Dec
Jan
Feb
Mar
Apr
Jul
Calendar
Sun 10/1
Mon 10/2
Tue 10/3
Wed 10/4
Thu 10/5
Fri 10/6
Sat 10/7
Sun 10/8
Mon 10/9
Tue 10/10
Wed 10/11
Thu 10/12
Fri 10/13
Worship
Education
Business Planning

Viewing an Individual's Offering records

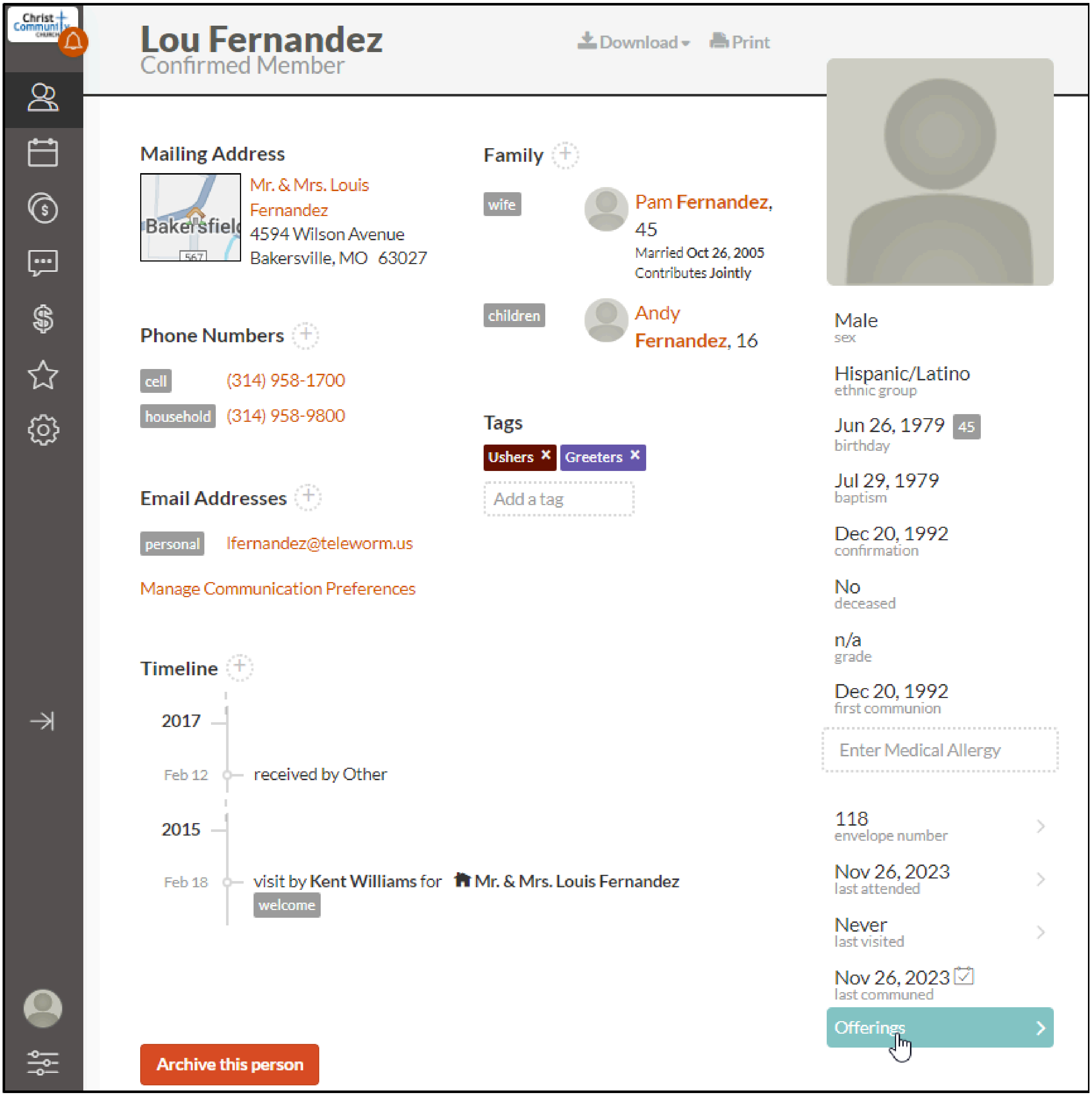
A person’s profile contains a link to view offering history that users can use to reference what a person has given to the church.

To view a person's offering history from their individual record,

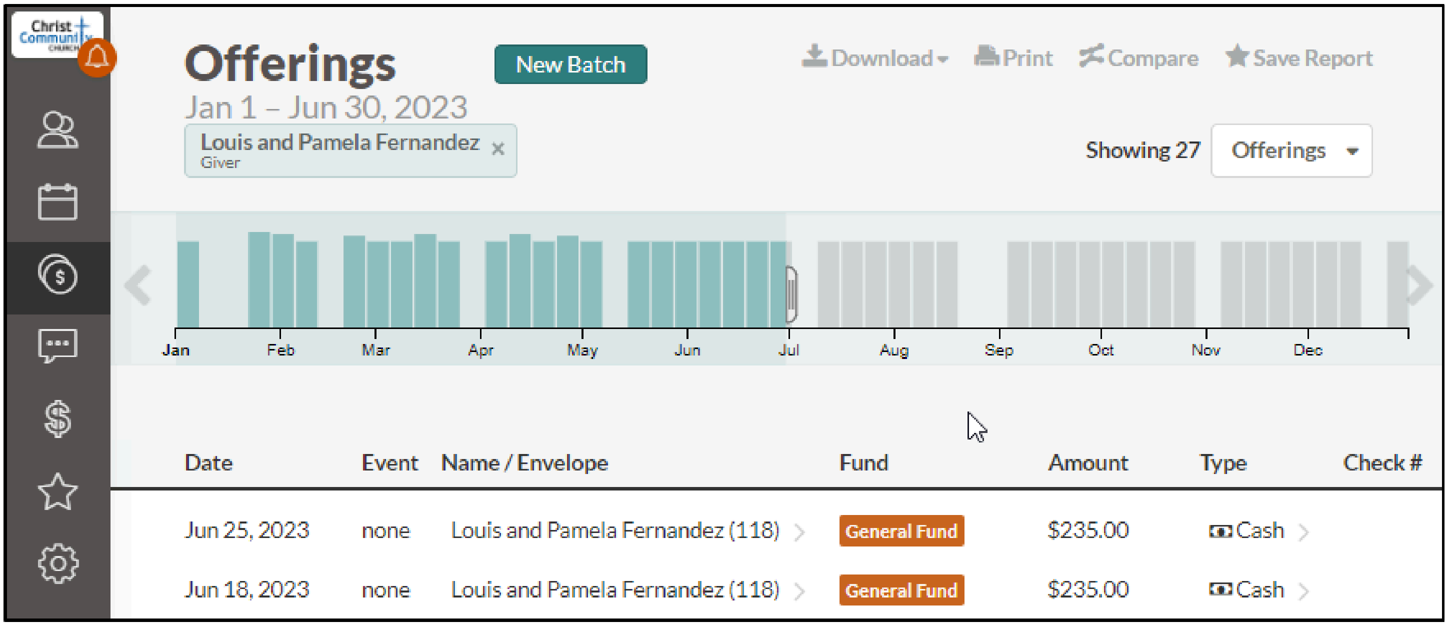
1. Go to the People view and click on the individual's name to open the profile.



2. On the right side of the profile, click on the “Offerings” link to open the Offerings view filtered to show only that giver. If a giver is currently giving jointly with a spouse, the Offerings view that is displayed will be for the couple only.



3. Offerings data can be further filtered by date, fund, or type of transaction (cash, check, electronic) and can be exported, printed, or saved as a report.

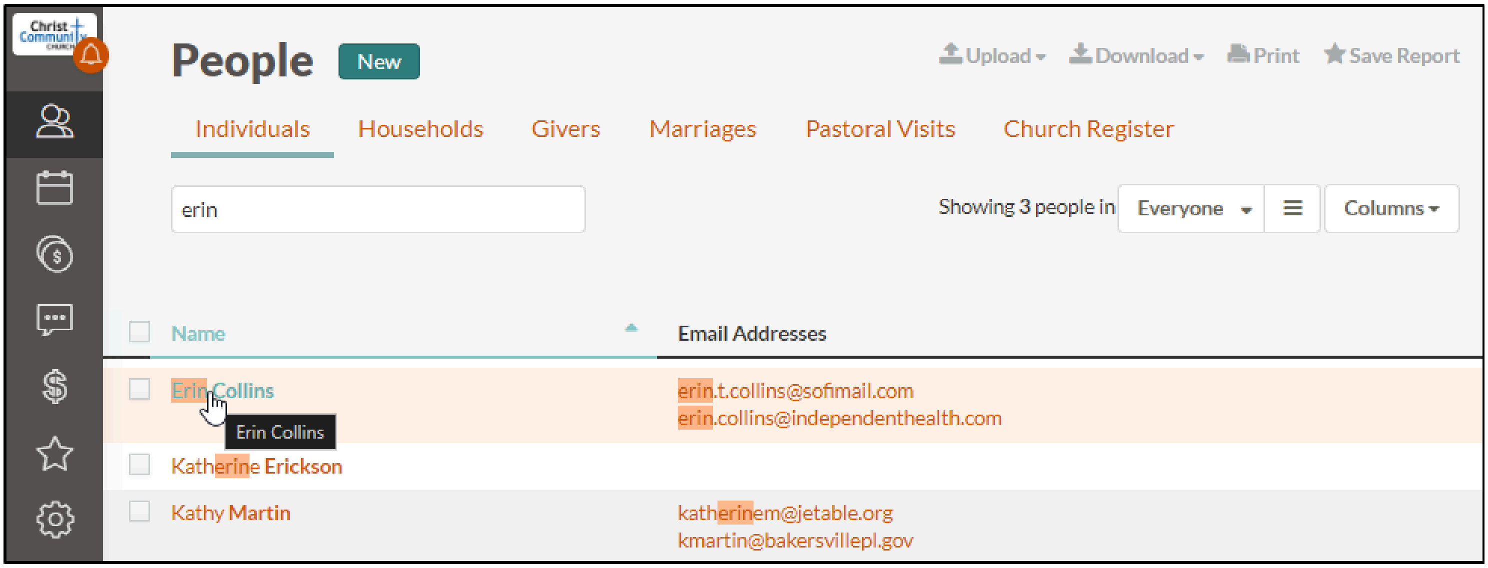

Offerings
New Batch
Download
Print
Compare
Save Report
Jan 1 – Jun 30, 2023
Louis and Pamela Fernandez
Giver
Showing 27
Offerings
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
Date Event Name / Envelope Fund Amount Type Check #
Jun 25, 2023 none Louis and Pamela Fernandez (118) General Fund $235.00 Cash
Jun 18, 2023 none Louis and Pamela Fernandez (118) General Fund $235.00 Cash

Printing an Individual's Contribution Statement from their Profile

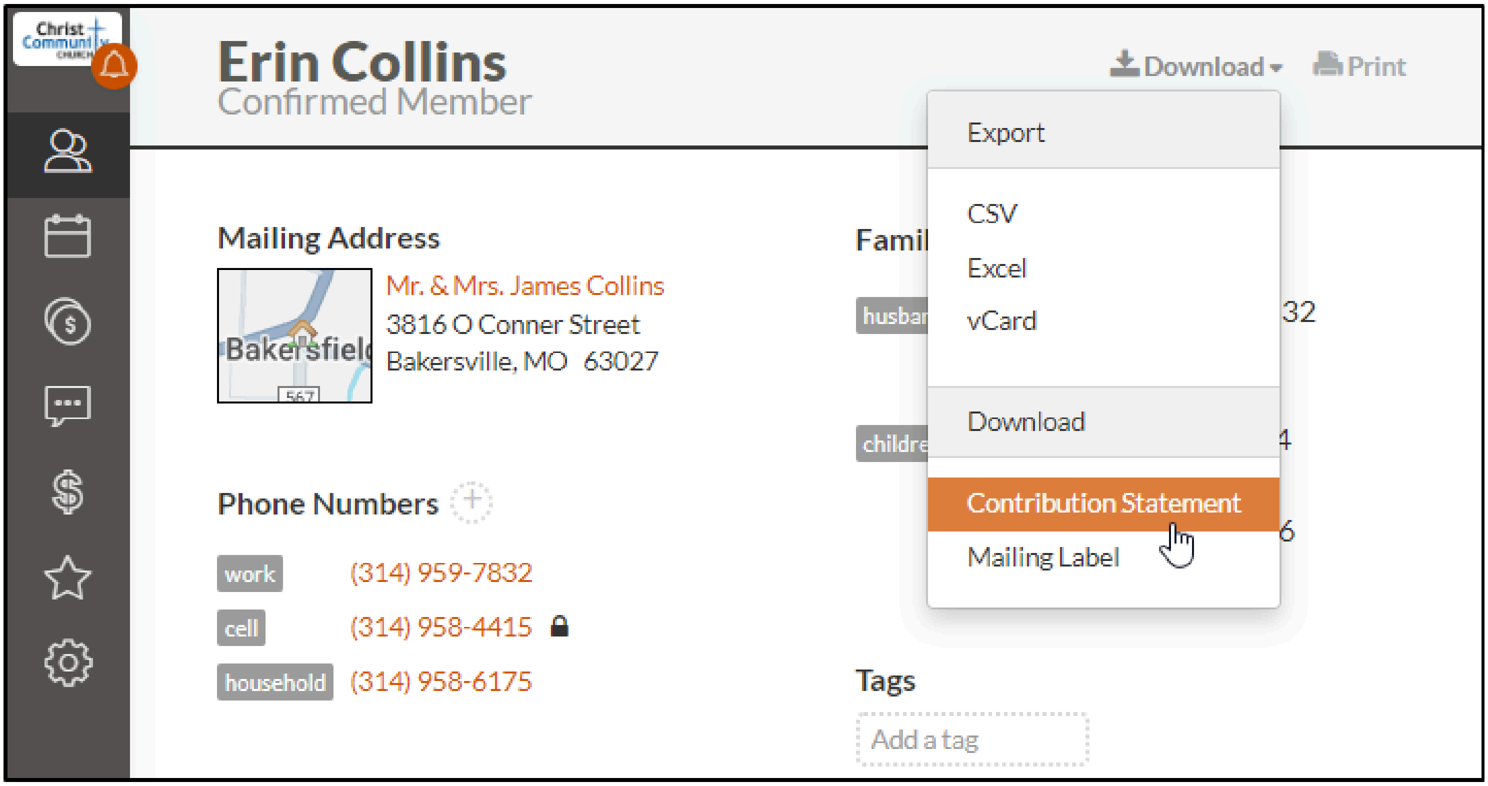
If a single person wants their contribution statement, users can print one from the person's profile.

To print a contribution statement for a single person,

1. Go to the People view and click on either the individual or household name to open the profile.



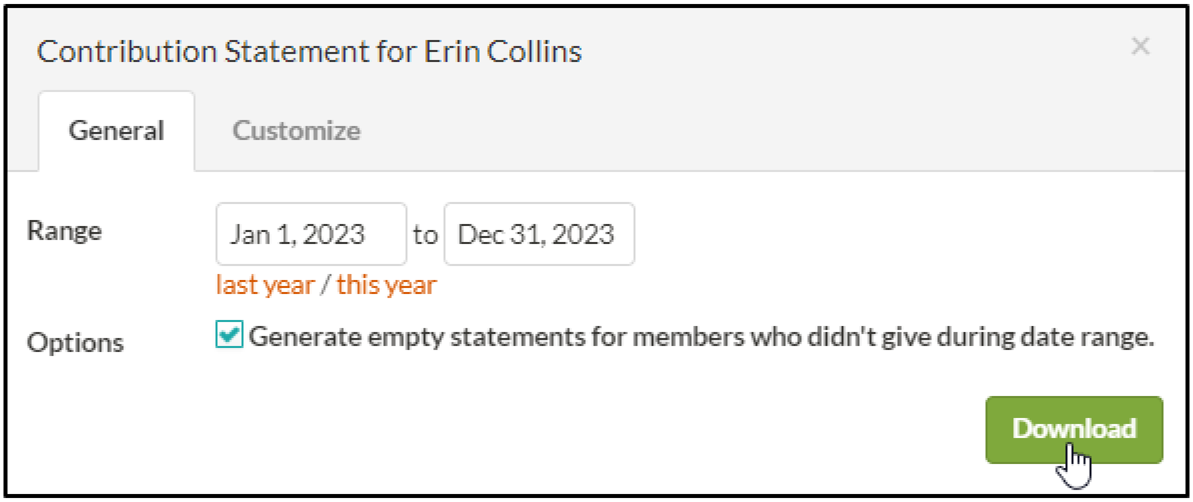
2. On the upper right of the profile, click "Download" to see all download options and choose "Contribution Statement".



3. In the setting window, choose the date range for the statement and whether an empty statement should be created if there are no offerings for this person within this date range.

4. 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.

5. Click the green "Download" button to download your statement as a PDF that you can print.


Contribution Statement for Erin Collins
×
General
Customize
Range
Jan 1, 2023
to
Dec 31, 2023
last year / this year
Options
Generate empty statements for members who didn't give during date range.
Download

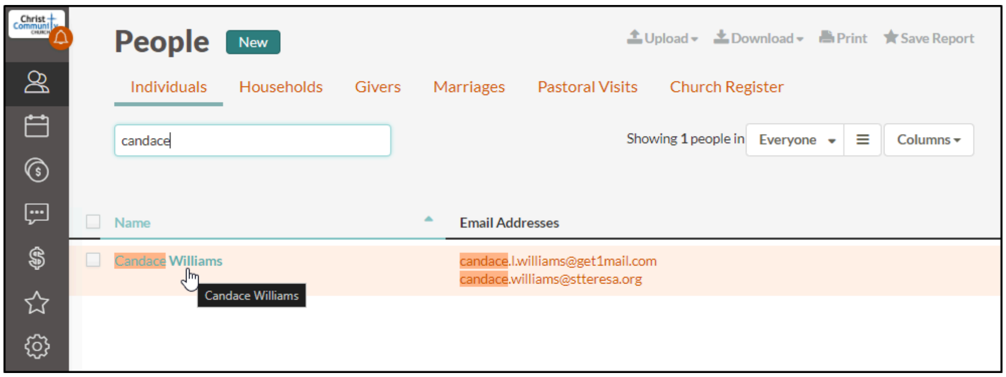
Emailing an Individual's Contribution Statement from their Profile

Individual contribution statements can be emailed from a person’s profile in Church360° Members.

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

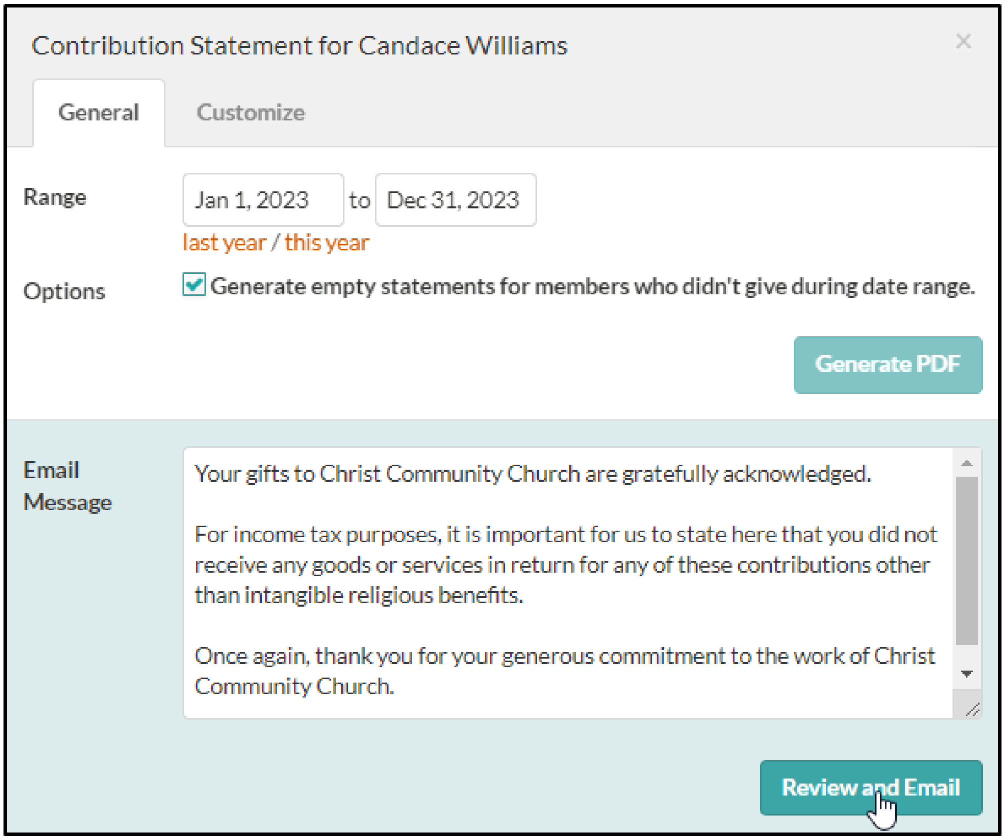
To email an individual their contribution statement,

1. Go to the People view and click on either the individual or household name to open the profile.



2. On the upper right of the profile, click "Download" to see all download options and choose "Contribution Statement".

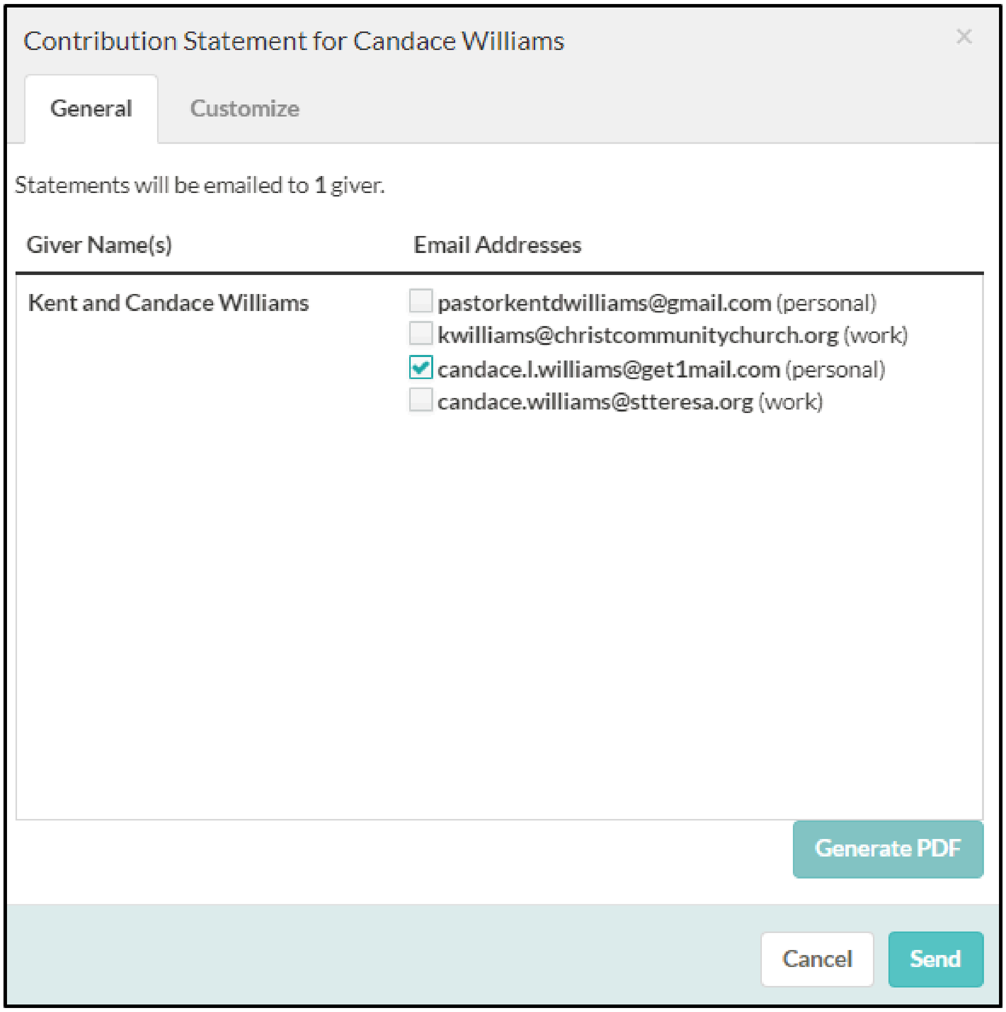
3. In the setting window, choose the date range for the statement and whether an empty statement should be created if there are no offerings for this person within this date range.



4. Edit the body of your email message in the box at the bottom of the screen.

5. Click on the “Review and Email” button to prepare your statements for email.

6. Select which of the available email addresses should receive the statement and click “Send.” The statement will then be emailed to the contributor.


Contribution Statement for Candace Williams
General
Customize
Statements will be emailed to 1 giver.
Giver Name(s)
Email Addresses
Kent and Candace Williams
pastorkentdwilliams@gmail.com (personal)
kwilliams@christcommunitychurch.org (work)
candace.l.williams@get1mail.com (personal)
candace.williams@stteresa.org (work)
Generate PDF
Cancel
Send

Printing or Exporting 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. It can also be done to keep hard copies of member's information.

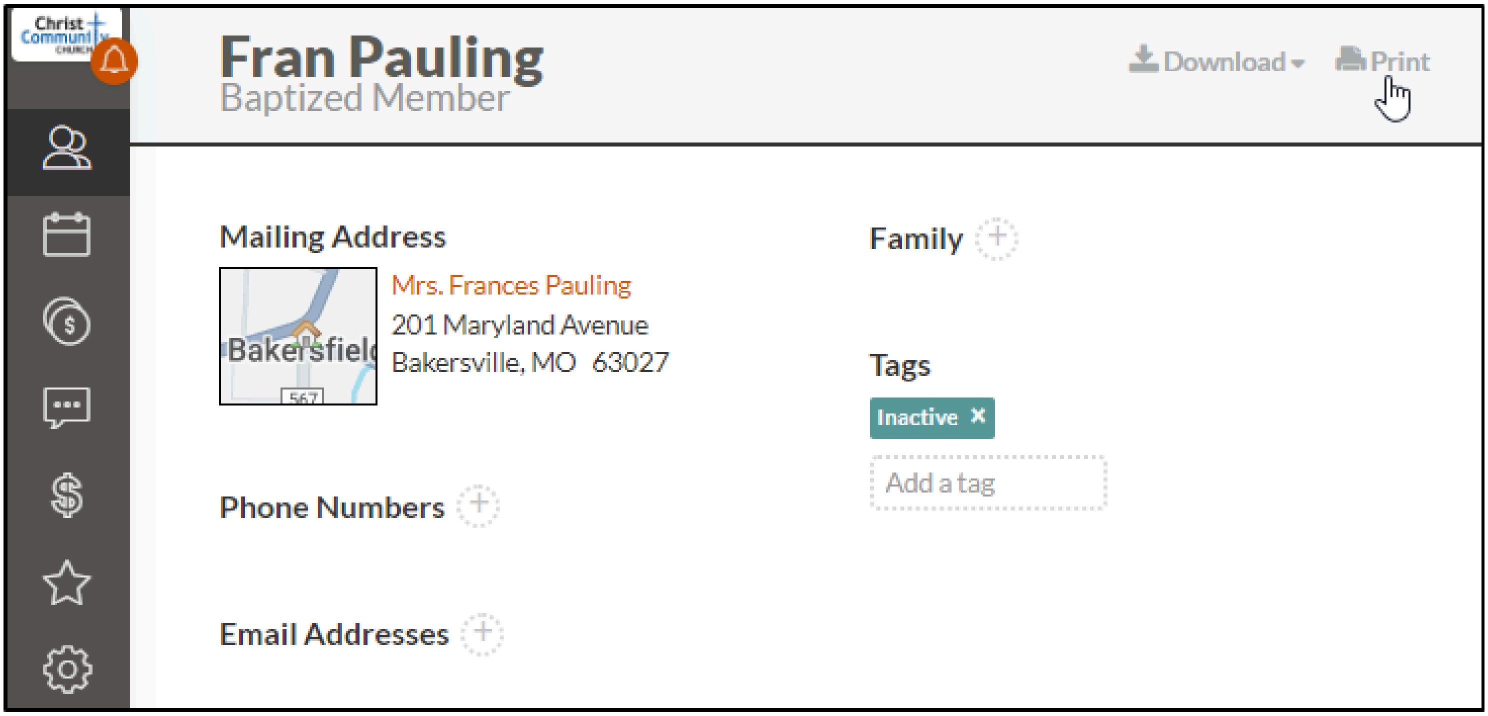
Note: Only fields and notes that are visible to the user printing the record will be included.

To print or export an individual or household record,

1. Go to the People view and click on either the individual or household name to open the profile.

2. On the upper right of the profile, click to download or print the record.

- Click "Download" to export the record into a CSV or Excel file.
- Click “Print” to open the record in a new browser tab. To print from the browser, press CTRL+P or right-click the page and choose “Print”.


Fran Pauling
Baptized Member
Download
Print
Mailing Address
Mrs. Frances Pauling
201 Maryland Avenue
Bakersville, MO 63027
Phone Numbers
Email Addresses
Family
Tags
Inactive
Add a tag

Archiving Person Records

At the end of the year, after all of your year-end reports have been run and printed, you may want to archive people who have been removed, deceased, or otherwise, are unneeded on any reports or views.

With the archive feature, you can place these people in a special section of Church360° Members that allows you to exclude them from all reports but still retain them in most membership, attendance, and offering figures.

Archiving is also the first step to deleting a record entirely. Households are automatically hidden when all members within it are archived.

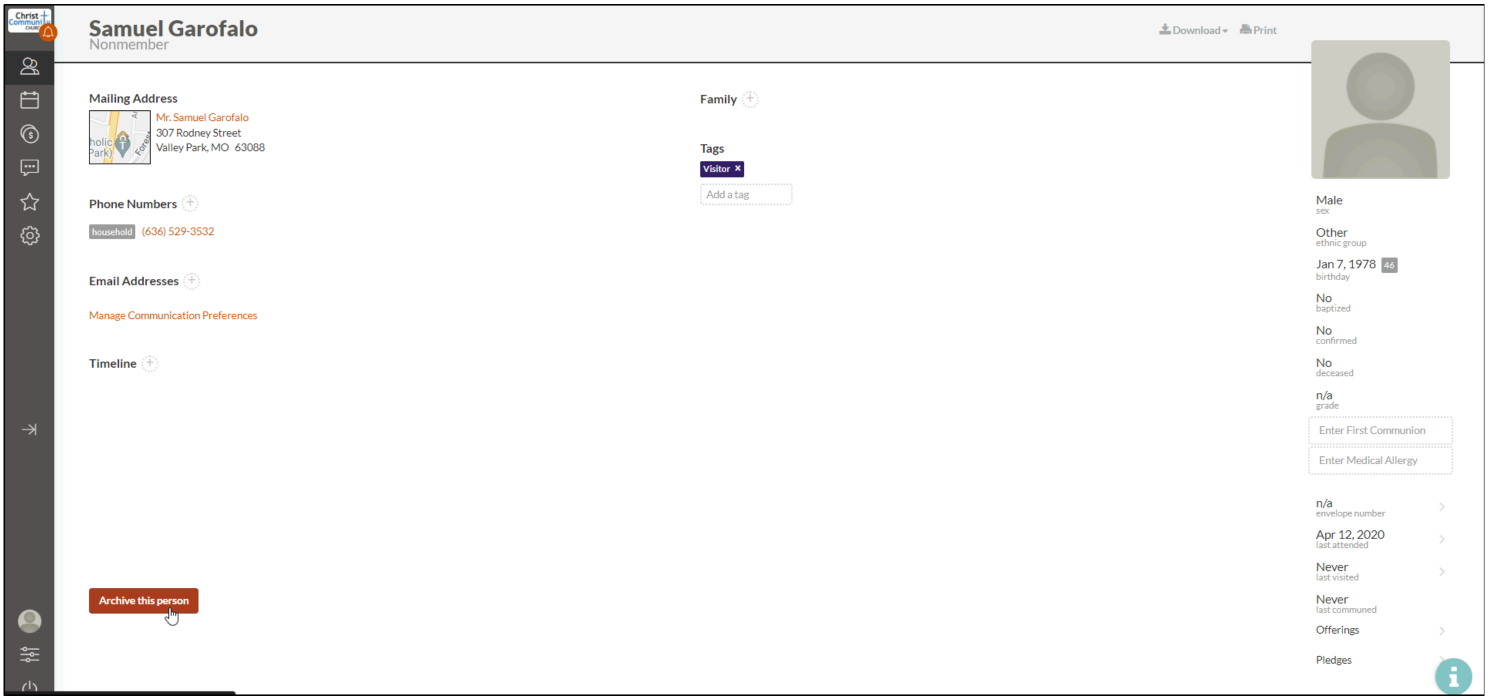
It is not recommended to archive people you may need to report on later. It would be a good rule of thumb to keep removed members for at least five years. Though unarchiving is available, as the database changes over time, it may become increasingly difficult to reintegrate their record into the updated interface.

If a person is giving jointly and is archived, the giving unit is severed and the remaining spouse will contribute separately from that time forward. If the person is unarchived, they will need to be marked as contributing jointly with their spouse again as well as reassigned their envelope.

If you are needing to archive multiple records, you can use the Bulk Archive utility on the People view.

To archive a person,

1. Open the person's record from the People view from your preferred mode. Keep in mind, only individual records can be archived.
2. Below the Timeline section of the person record, click the button that says "Archive this person".
3. Click the "Archive Person" button to confirm that you want to send this person to the Archived section.


Samuel Garofalo
Nonmember
Download
Print
Mailing Address
Mr. Samuel Garofalo
307 Rodney Street
Valley Park, MO 63088
Phone Numbers
household (636) 529-3532
Email Addresses
Manage Communication Preferences
Timeline
Archive this person
Family
Tags
Visitor
Add a tag
Male
sex
Other
ethnic group
Jan 7, 1978 46
birthday
No
baptized
No
confirmed
No
deceased
n/a
grade
Enter First Communion
Enter Medical Allergy
n/a
envelope number
Apr 12, 2020
last attended
Never
last visited
Never
last communed
Offerings
Pledges

Deleting Person Records

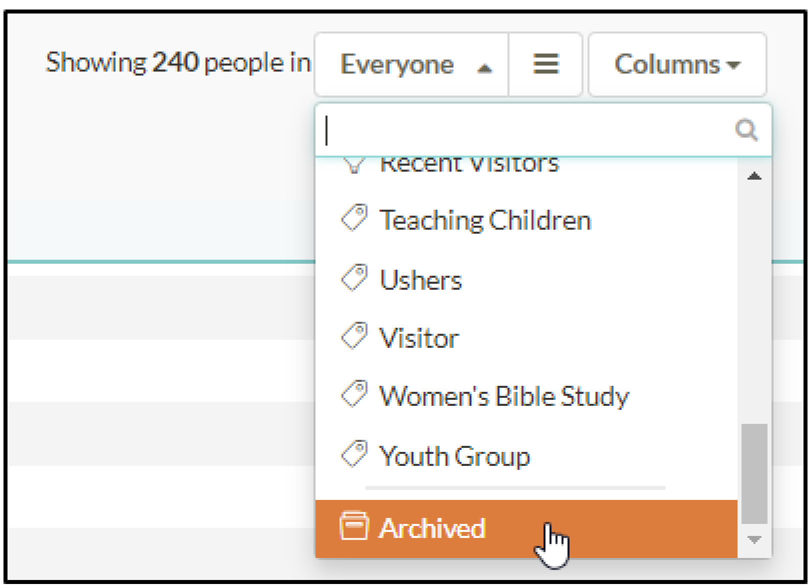
In some instances, you may come across a situation where duplicate records have been created for a single person. After making sure to move over any attendance and offering data over to one record, you'll then need to delete the extra record.

Once a person is deleted, their attendance records are deleted and offerings will be changed to Loose Offerings. Households are automatically removed when empty.

For bookkeeping purposes, it is **not** recommended to delete non-duplicate records to preserve historical attendance and contribution data on past annual reports.

To be deleted, a person's record must first be archived.

1. To access the list of archived persons, go to the People view and click the drop-down menu for Smart Groups and Tags.
2. 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.



3. Click the person's name to go into their profile and click the Delete button located below the Timeline section to remove their record completely.


Dave Abbott
Nonmember
Mailing Address
The Abbott Household
No address
Phone Numbers
Email Addresses
Manage Communication Preferences
Timeline
Family
Tags
Delete this person
Unarchive this person
Unknown
sex
Unknown
ethnic group
Unknown
birthday
No
baptized
No
confirmed
No
deceased
n/a
grade
Unknown
first communion
Unknown
medical allergy
n/a
envelope number
Never
last attended
Never
last visited
Never
last communed
Offerings
Pledges

Introducing the new Profile View

The profile view displays information specific to an individual. This view has always been divided into distinct sections, each dedicated to a particular type of information. As of 10/9/2025, Church360° will be providing a new version of the individual profile view. The types of data will not change, but the layout and usage will be improved to provide a more intuitive interface.

The divisions for different types of information are as follows:

Name Banner

Across the top of the record, Name, Photo, and Membership status are displayed, as well as options to download or print the profile, or edit the data in the banner.

the bottom of the banner section, you will see Information and Timeline links or tabs you can use to select which of these data types you wish to view.

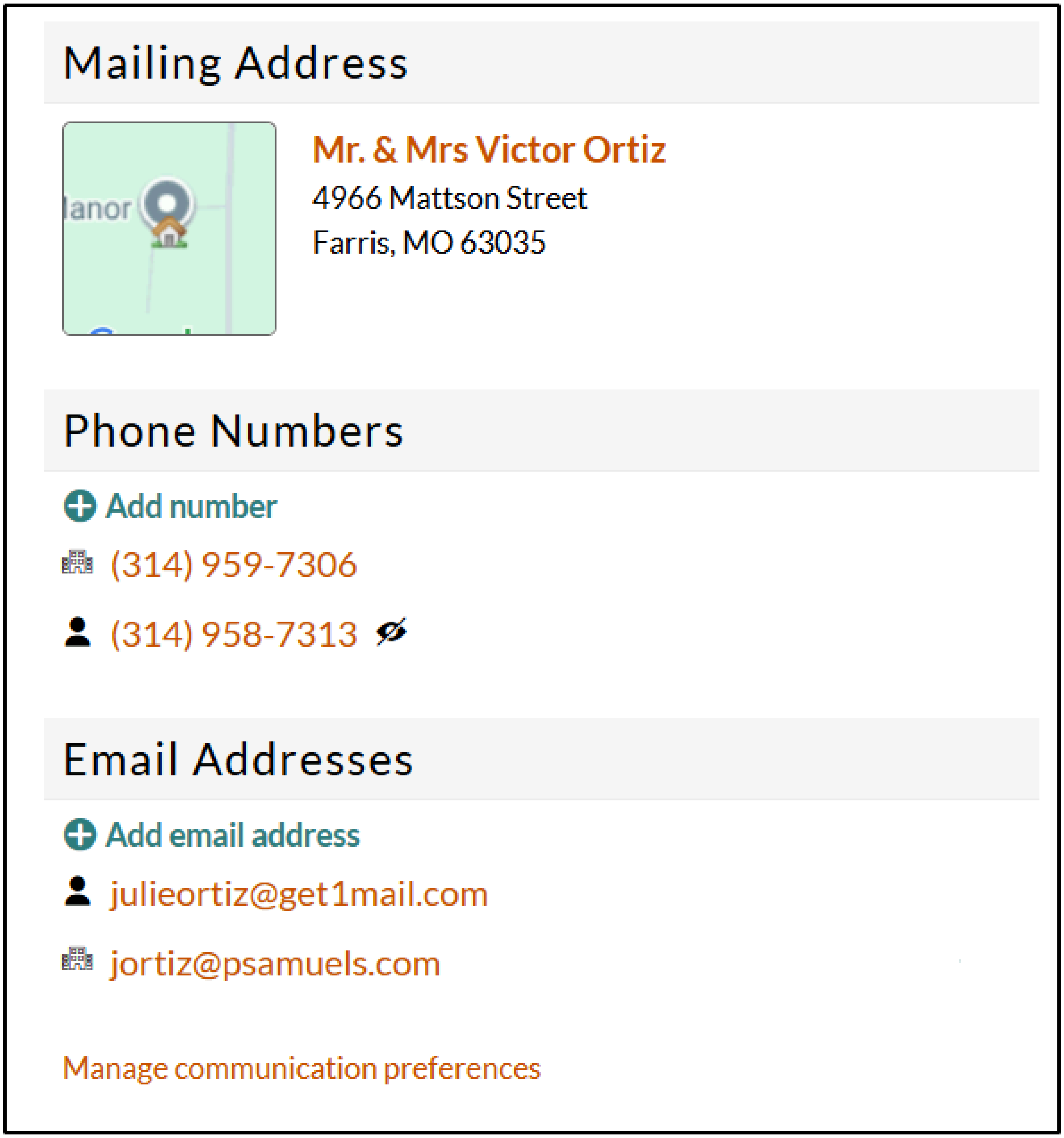
Information Tab

There are several sections here.

On the left side,

1. Contact information on the upper left, including:

- Address
- Phone numbers
- Email addresses
- As well as the "Manage communication preferences" link.



Mailing Address

Mr. & Mrs Victor Ortiz
4966 Mattson Street
Farris, MO 63035

Phone Numbers

Add number

(314) 959-7306

(314) 958-7313

Email Addresses

Add email address

julieortiz@get1mail.com

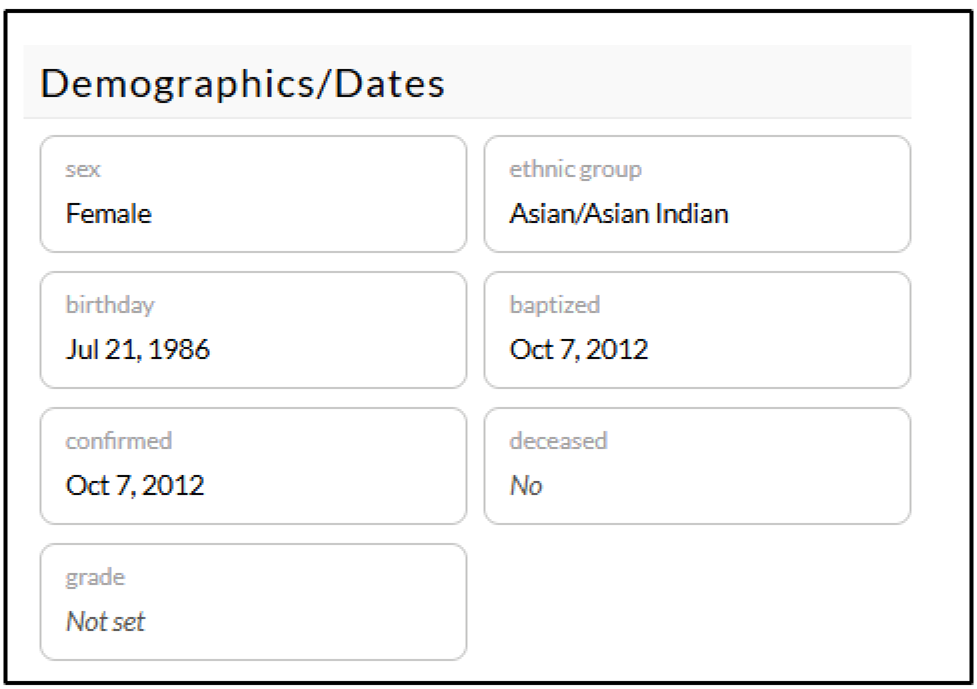
jortiz@psamuels.com

Manage communication preferences

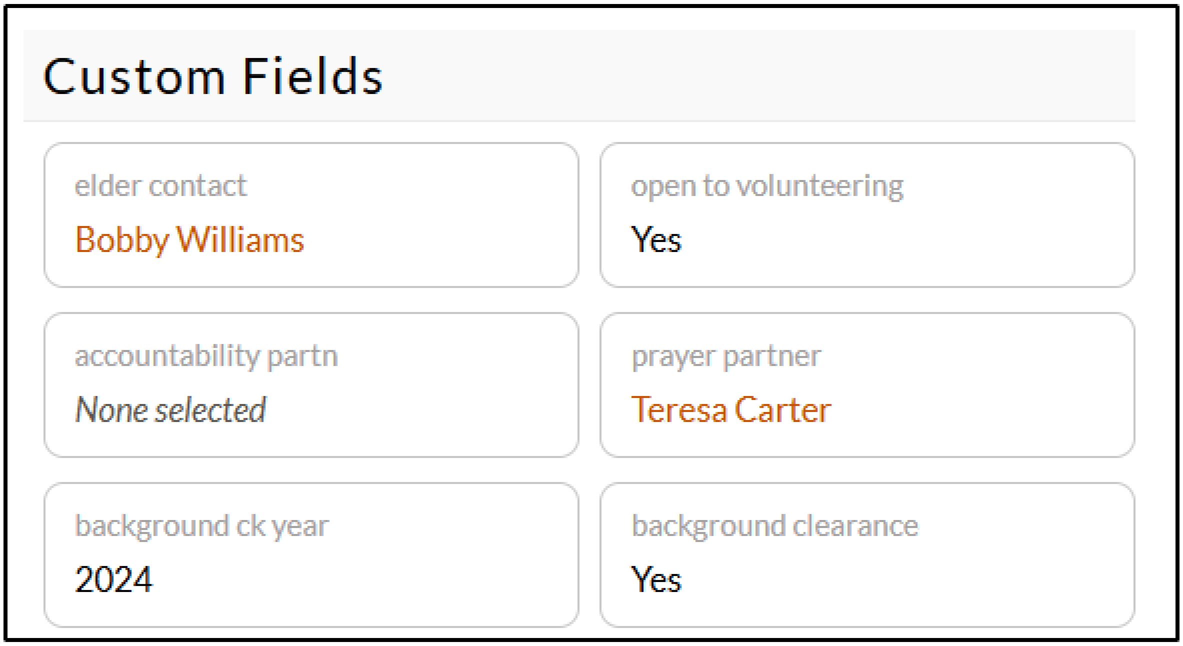
2. The Family section, to establish connections with the profiles of family members.

On the Right side,

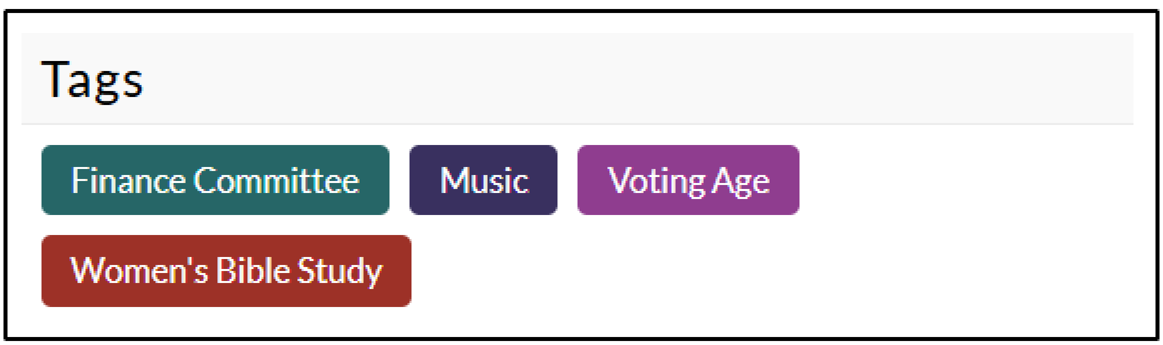
1. Demographics/Dates - default fields to identify each person and their significant life events.



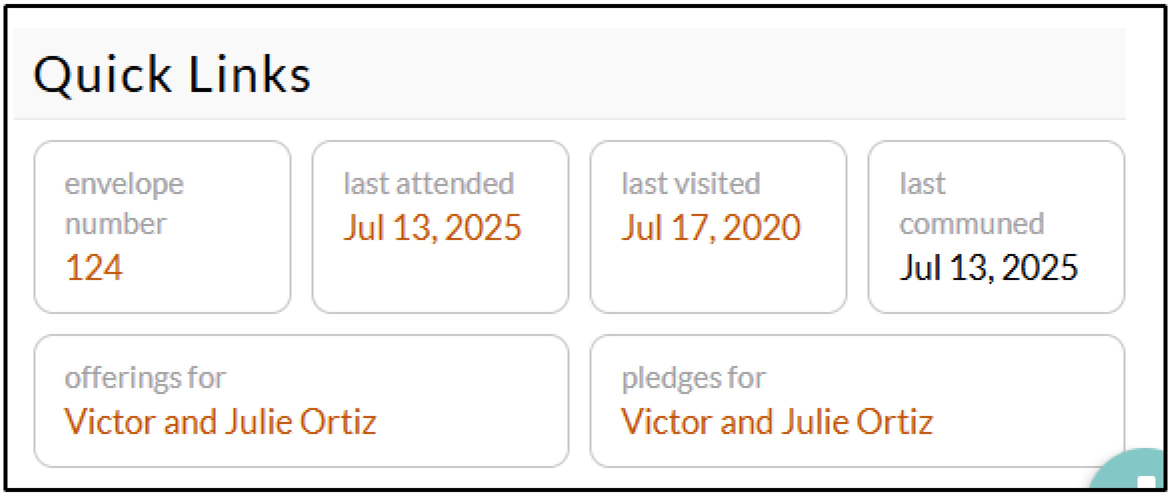
2. Custom Fields - these fields are created by Church360° users and are unique to your site, but the fields displayed will be the same across all profiles. They can include dates, drop-lists, links to another person's profile or to a website, and text fields.



3. Tags - these are also unique items created by Church360° users, but each profile can have different tags applied, to attribute a common trait that person shares with others.

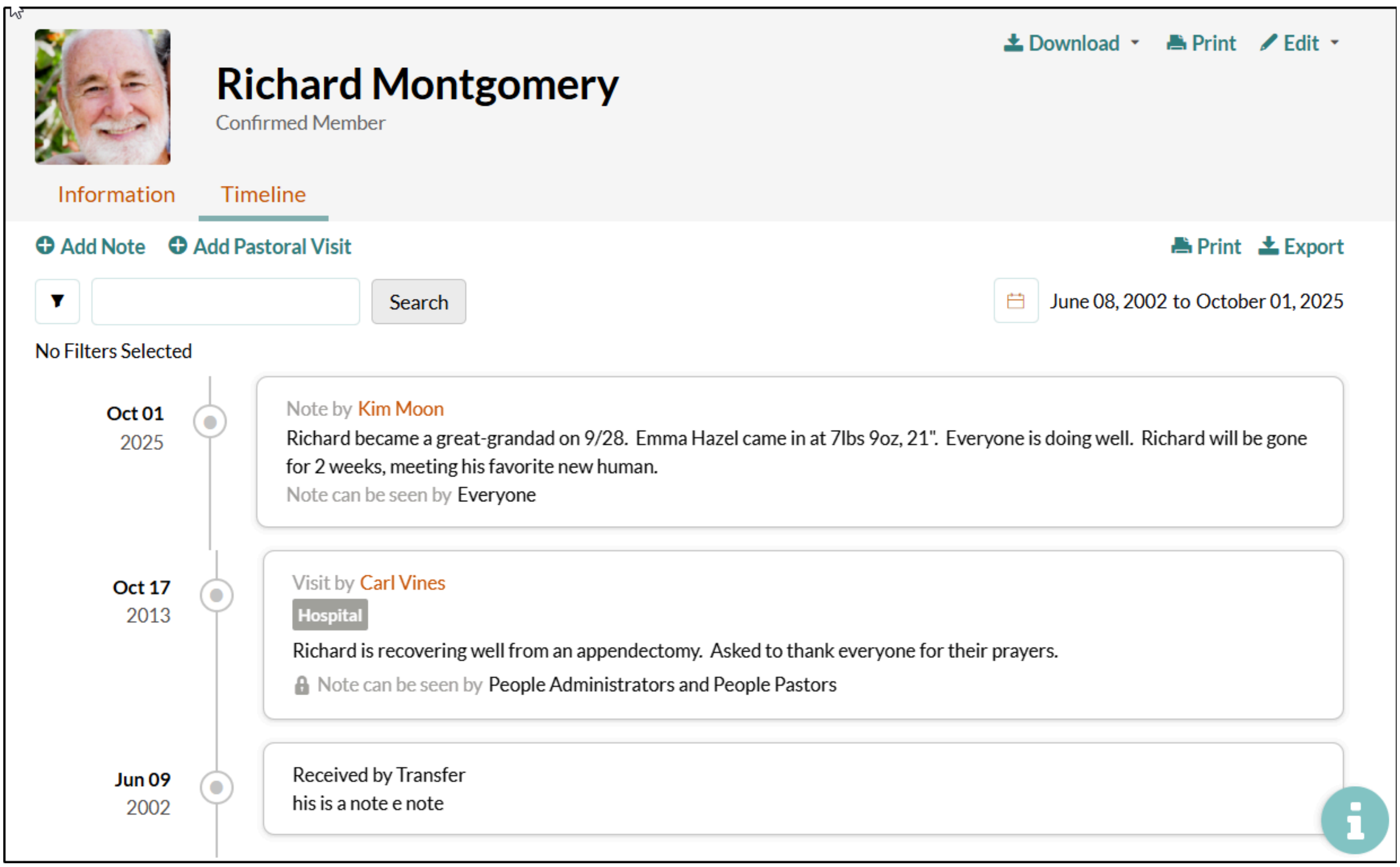


4. Quick Links - these are system-generated and consistent across all profiles to show the types of data seen below. Most can be clicked on to take you to more information about the person in question



Timeline Tab

The timeline tab will show the notes, visits, and life events that have been recorded for this individual over time.



Noteworthy Facts About the New Profile View [New Profile View]

As of 10/9/2025, Church360° is providing a new version of the individual Profile View. The types of data will not change, but there will be several changes to the view and how it functions. Some key things to note are listed here.

Layout

The organization of the Profile View has changed. The view will now be divided into two clickable tabs below the Name banner.

Information	Timeline

And the Information tab is subdivided into sections, listed below.

	Demographics and important dates
Contact information	Custom Fields
Family relationships	Tags
	Quick Links

Membership status

Setting Membership status now happens in the Name banner, under the Edit drop-down, rather than in the Timeline view.

Downloads

When downloading from the Profile view, instead of getting a preview, a file will be downloaded from the browser rather than opening a preview first.

Changing Households

To move a person into a different household in the new Profile view, you will click the Edit button for the Address, and select "Change household".

Editing and saving information

In the original Profile view, clicking on a piece of information opened it for editing, and clicking out of that field saved your changes automatically. The new profile view has added Edit buttons with action options and Save buttons, avoiding unintended changes.

Contact changes

- Marking a contact as unlisted is now done through the Edit option, and the icon for unlisted contacts has changed from a lock to an eye icon with a slash through it.
- The concept of a Preferred contact for either voice calls, texts, or emails has been introduced. You can select this as an option under Edit as well. When a number is marked as preferred for voice, you'll see a vintage telephone receiver icon. If it's preferred for text, it will look like a text bubble, and if an email address is marked as preferred, you'll see an envelope icon.

Family

- The Family section is now on the lower-left side of the Information tab.
- Children are now listed in descending age order by default, if birth dates are provided.
- Profile photos are now square.

Tags

To add or remove a Tag, you'll now click edit first, and use a drop-down with check-boxes to select/deselect tags as desired. This should eliminate accidentally deleting tags from a profile with a click.

Timeline

- You can now export data from the Timeline tab to Excel.
- When clicking to a Pastoral Visit from the Timeline, you will be taken to the Pastoral Visits view for consistent data entry.

Navigating Person Records [new profile view]

An individual’s profile view displays specific information about the individual and is divided and subdivided into distinct content areas.

The three main areas are the top name banner, the Information tab, and the Timeline tab.

Name Banner

The individual's name, photo (where provided), and membership status are displayed in the top banner section of the profile. For information on the different membership status designations, see Membership Statuses Explained

- The **Download** drop-down will allow you to select to export the following for the individual:
    - A CSV or Excel file of their record. For details, see:
        - Printing or Exporting Profiles for more information.
    - A vCard with their name and contact information
    - A Contribution Statement. For details, see:
        - Emailing Contribution Statements from the Profile View
        - Printing Contribution Statements from the Profile View
    - A Mailing Label
- The **Print** button will open a print preview of their record, which you can then print or save as a PDF.
- And the **Edit** drop-down will allow you to select one of the options below:
    - Edit Profile Photo

        - This will open a window where you can add, replace, delete, or crop a photo of the individual. For details, see:
            - Adding Protos to Profiles
    - Edit Name
        - This allows access to the individual's Title, Preferred Name, Middle Name, Last Name, Legal Name, Maiden Name, and Suffix. Note: The Legal Name will be the name that is used on Contribution Statements. For details, see:
            - Editing a Person's Name
    - Receive as Member (or Remove from Membership, depending on the individual's current membership status). Here you will be able to select a date for the status change, select the received or removed by reason, and add a Note if desired. For details, see:
        - Updating a Person's Membership Status

At the bottom of the banner section, you will see **Information** and **Timeline** links or tabs you can use to select which of these data sections you wish to view.

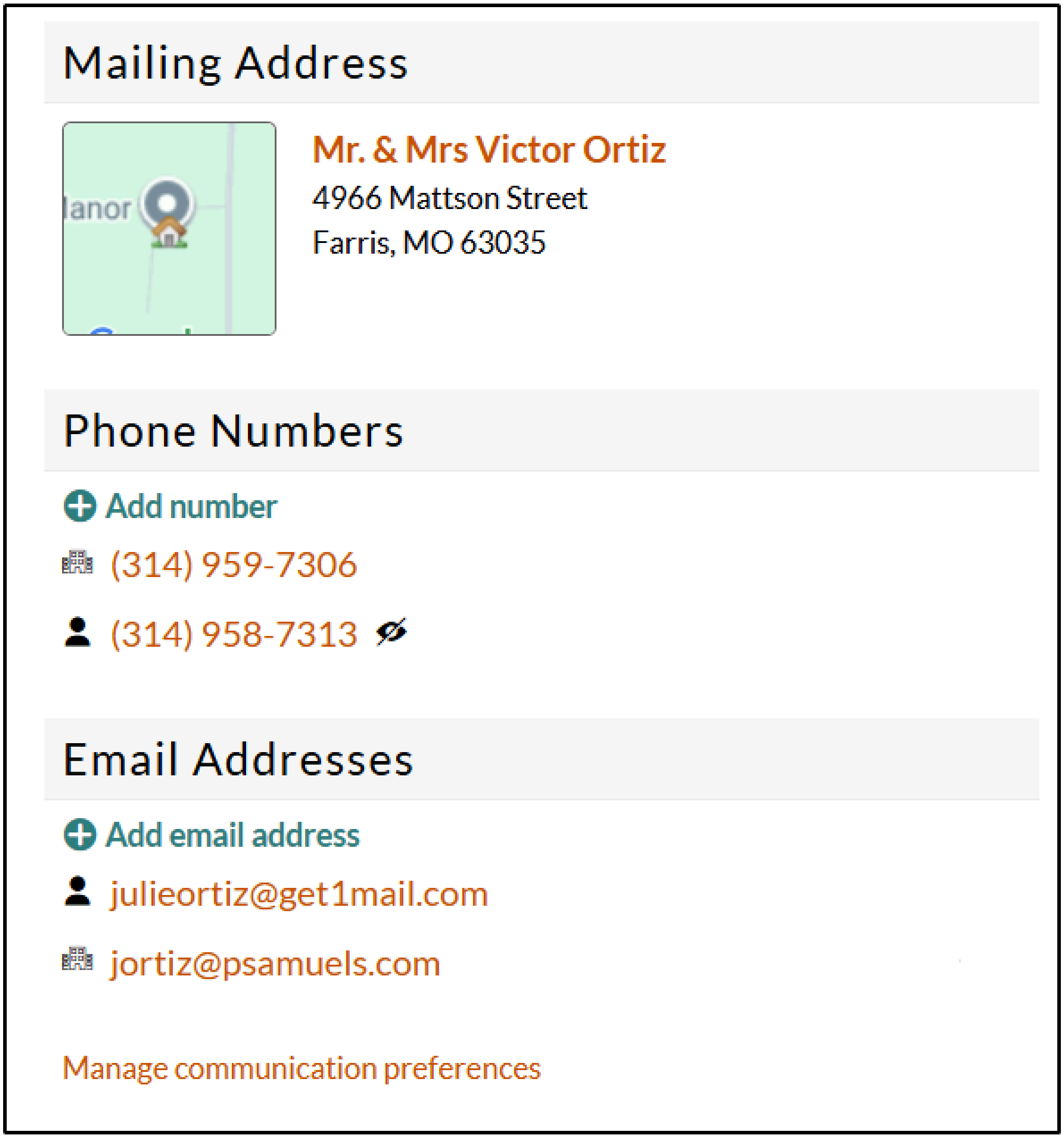
Information Tab

The information tab provides you with details of the individual including contacts, relationships, demographics and more.

On the left side, there are two sections:

1. **Contact information** is on the upper left, including:

- Address
- Phone numbers
- Email addresses
- As well as the "Manage communication preferences" link.
- For details, see:
    - Updating Contact Information
    - Updating Household Addresses
    - Adding an Away Address for an Individual



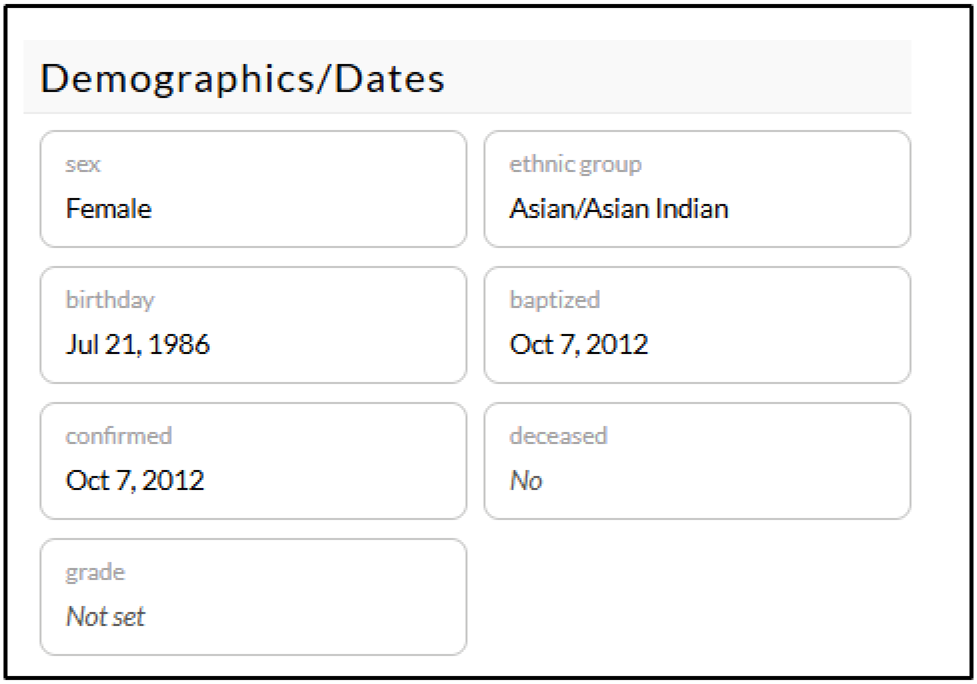
2. **Family** - this section allows you to establish and see connections with the profiles of family members. For details, see:

- Add, Edit or Delete a Relationship
- Adding a Marriage
- Recording a Divorce

On the Right side, there are 4 sections:

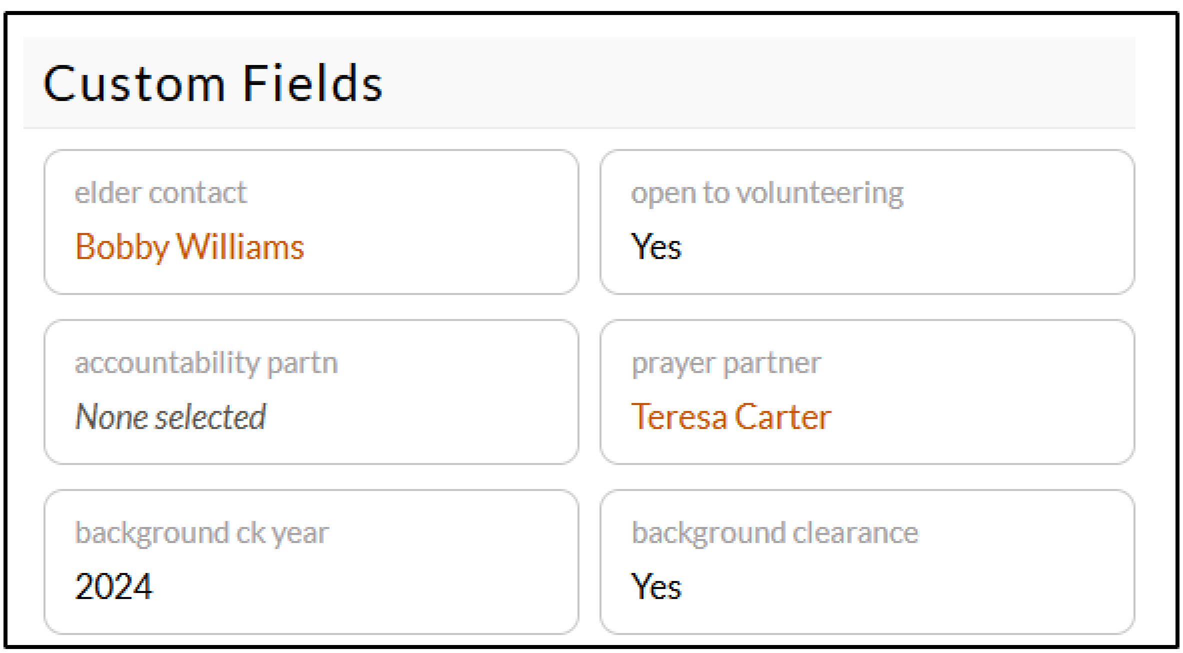
1. **Demographics/Dates** - default fields to identify each person and their significant life events. For details, see:

- Updating Personal Demographic Information



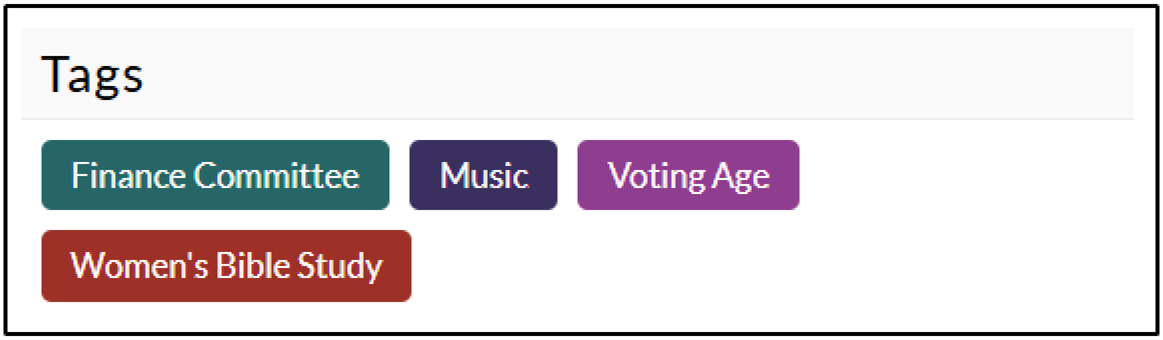
2. **Custom Fields** - these fields are created by Church360° users and are unique to your site, but the fields displayed will be the same across all profiles. They can include dates, drop-lists, links to another person's profile or to a website, and text fields. For details, see:

- Updating Custom Fields



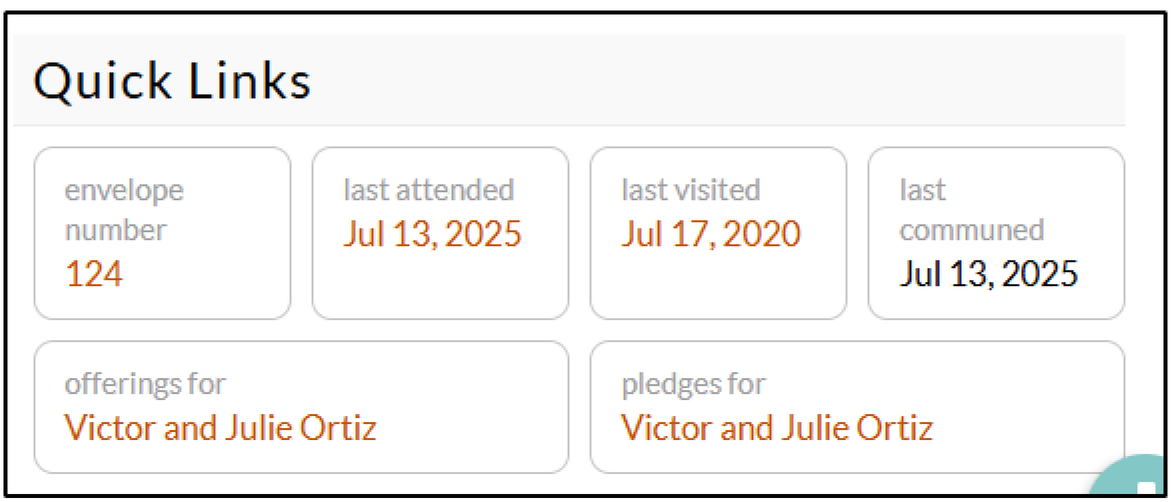
3. **Tags** - these are also unique items created by Church360° users, but each profile can have different tags applied, to attribute a common trait that person shares with others. For details, see:

- Adding or Removing Tags within a Profile



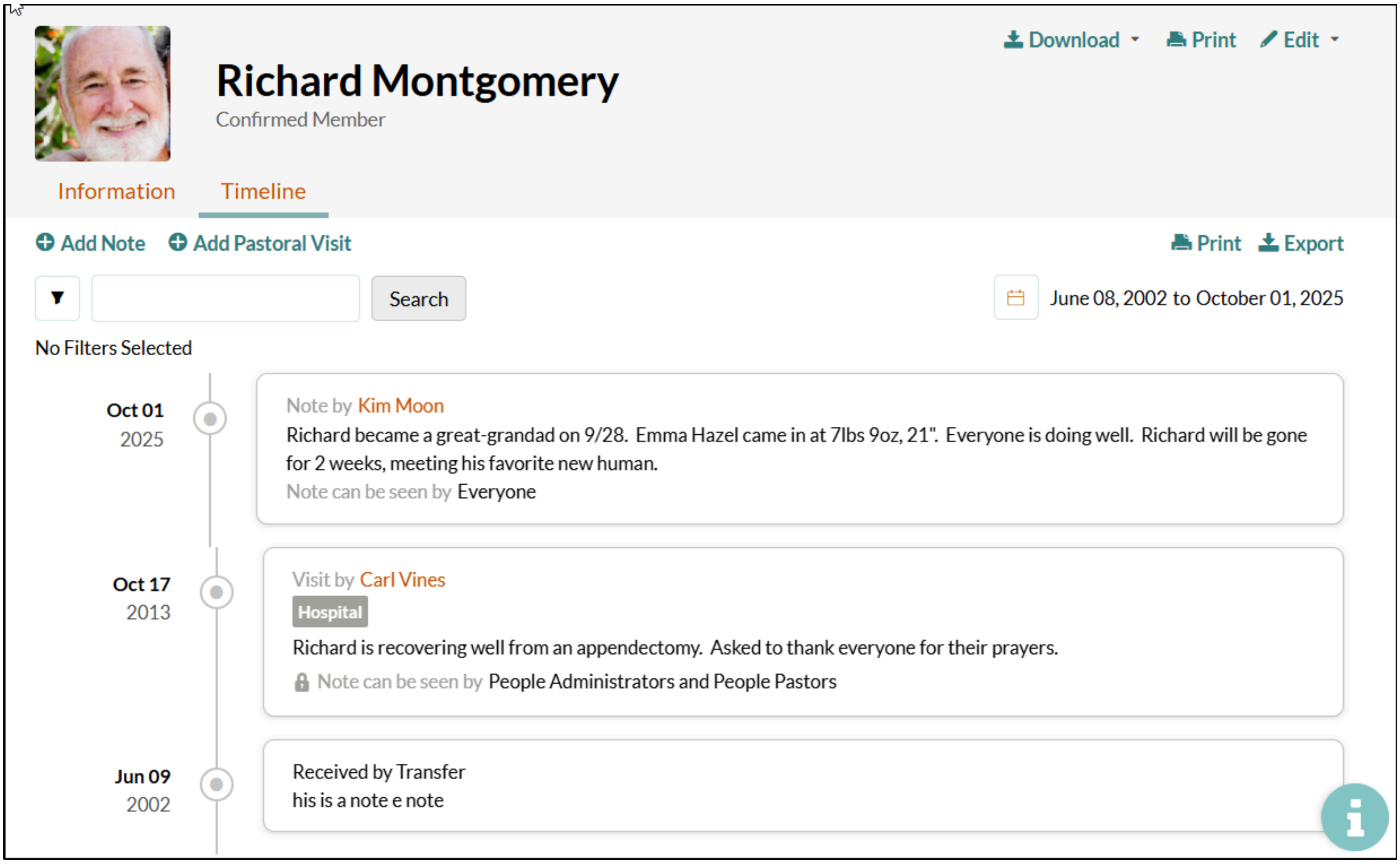
4. **Quick Links** - these are system-generated and consistent across all profiles to show the types of data seen below. Most can be clicked on to take you to more information about the person in question. For details, see:

- Viewing an Envelope Number from an Individual's Profile
- Viewing an Individual's Attendance
- Viewing Pastoral Visits from a Profile's Quick Links
- Viewing an Individual's Offerings
- Viewing Pledges from a Profile's Quick Links



Timeline Tab

The timeline tab will show the notes, visits, and life events that have been recorded for this individual over time.



For more information on the Timeline view, see:

- Adding, Editing, and Deleting Notes in Individual Profiles
- Adding, Editing, and Deleting Pastoral Visits in an Individual's Timeline

Editing a Person's Name [New Profile View]

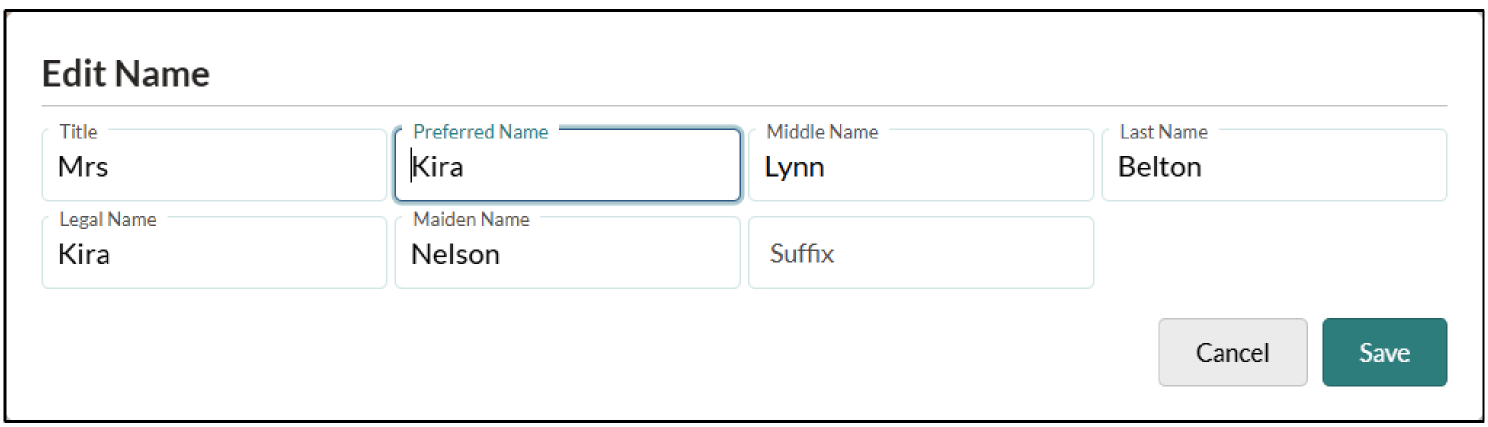
If a person's name has a typo or needs to be updated, users can make changes from the person's Individual profile.

Users can edit a name to update a person's title, preferred name (for most views and reports), middle name, last name, legal name (for contribution statements), maiden name, or suffix.

1. Click Edit in the upper-right of the name banner at the top of the record.

2. Select Edit Name.

3. Update any of the available name fields as needed.



4. Click Save.

Updating a Person's Membership Status [New Profile View]

Users can change a person's member or non-member status in the Name banner at the top of the Individual record/profile.

To add or remove someone from membership,

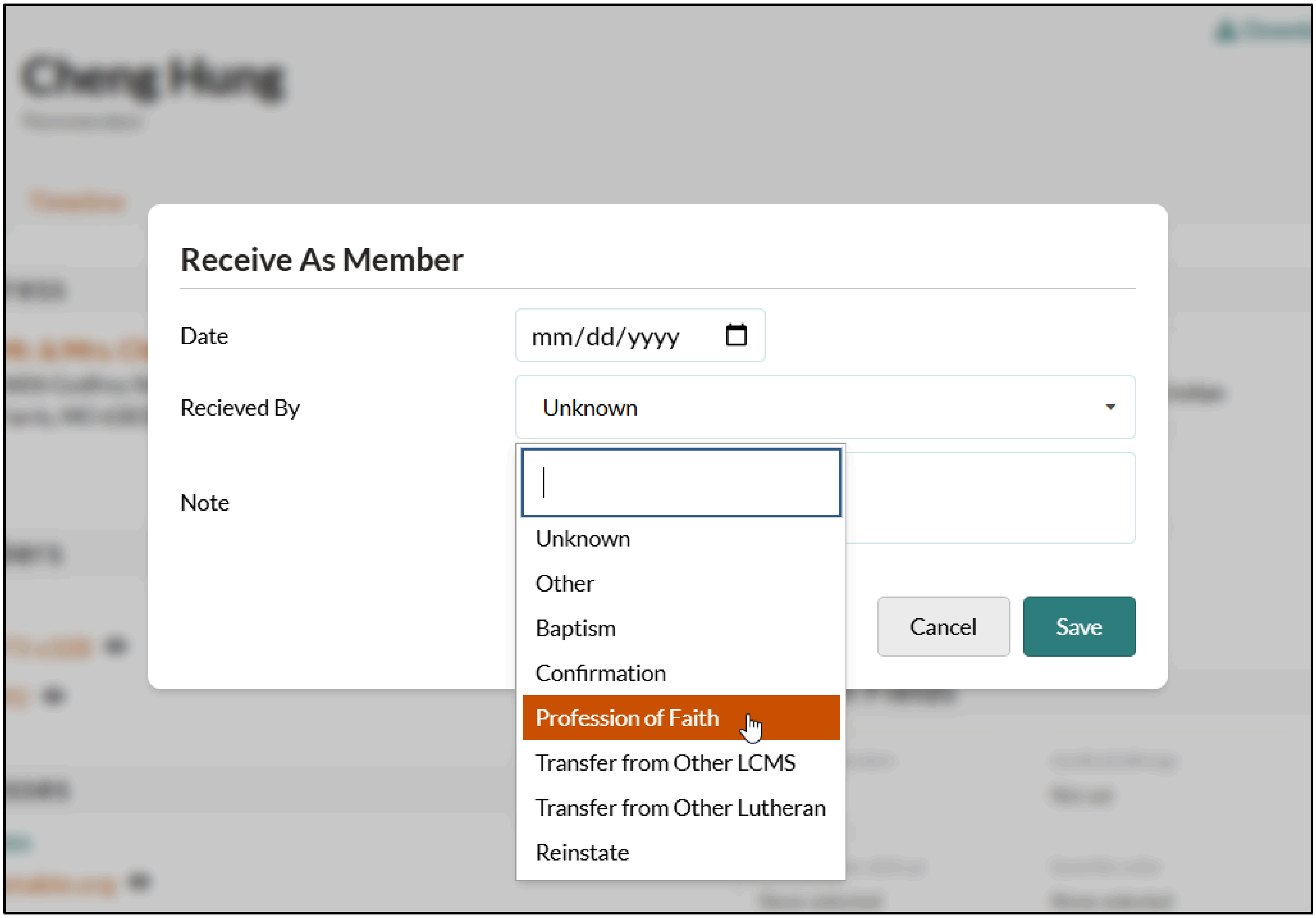
1. From the People's view, click on the individual’s name to open their profile and click Edit, on the far right of the name banner across the top.

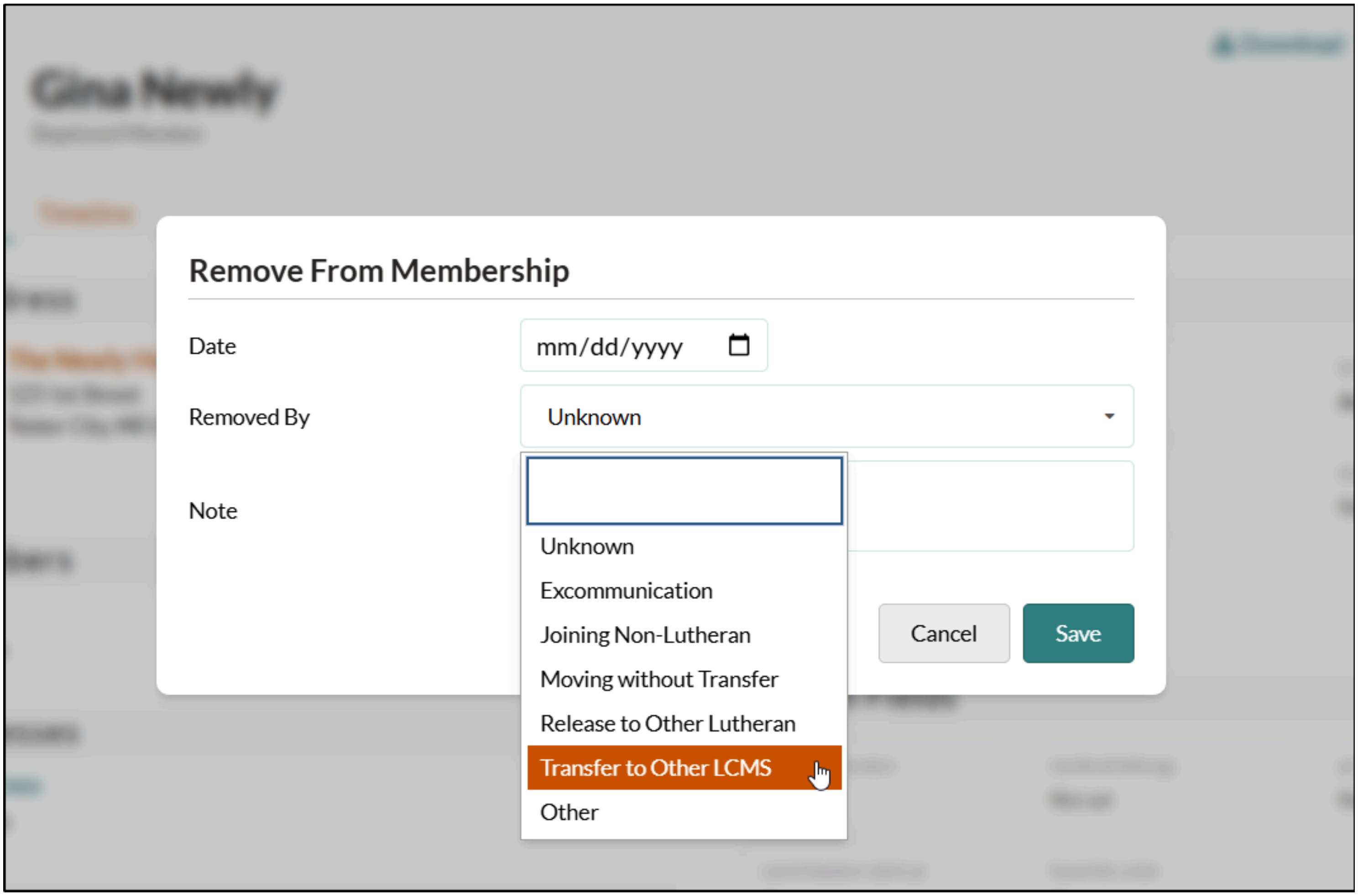
2. Click Edit, on the far-right.

- To make a non-member into a member, click the button to “Receive as Member”.
- To make a member into a non-member, click the button to “Remove from Membership”.

3. Set the date of the change.

4. Use the drop-down to select the reason for the membership reception or removal.


Receive As Member
Date
mm/dd/yyyy
Recieved By
Unknown
Note
Unknown
Other
Baptism
Confirmation
Profession of Faith
Transfer from Other LCMS
Transfer from Other Lutheran
Reinstate
Cancel
Save



5. You may also enter a note about this change as needed, and click Save to complete the change.

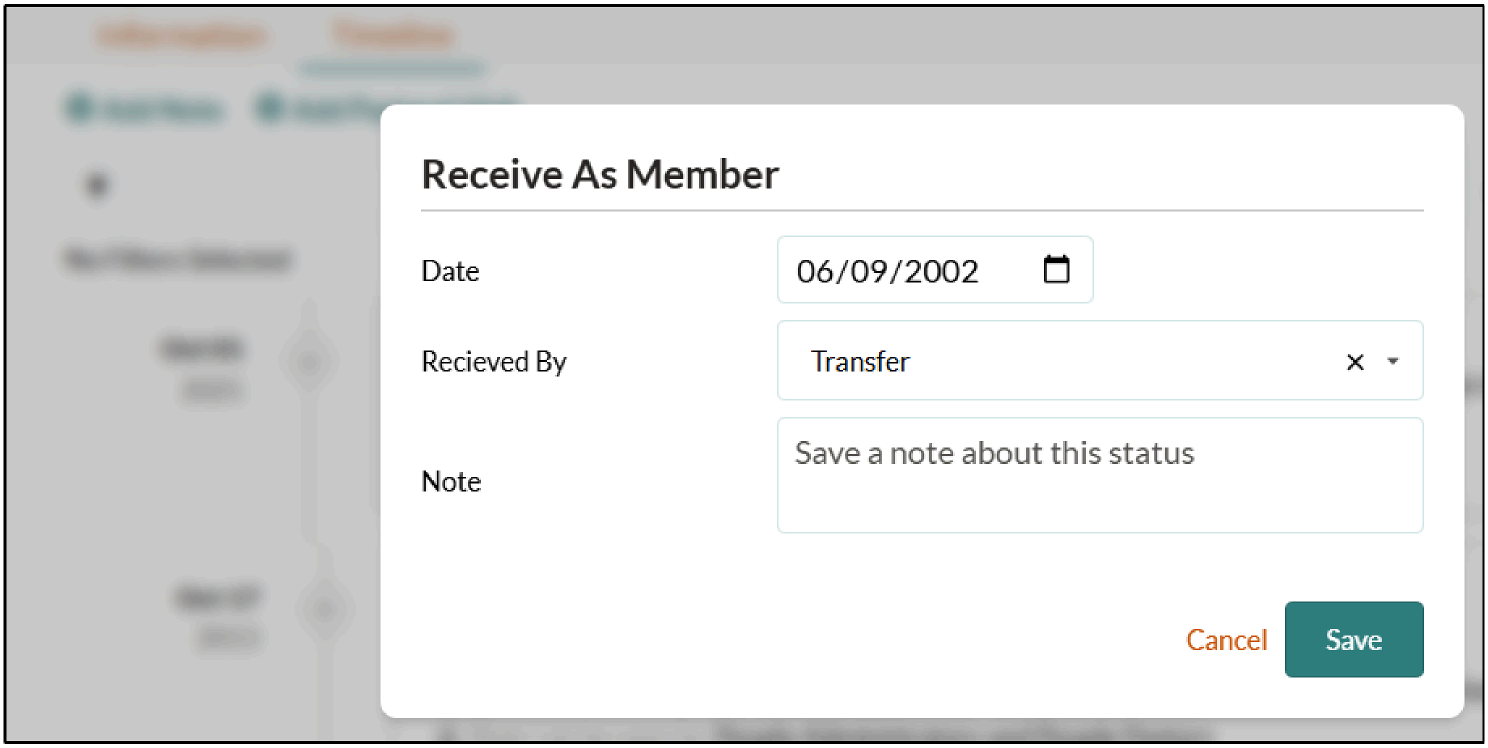
The above actions will create entries in the Timeline for this individual, as well as updating their Membership status on the Name banner.

To edit a date or received/removed by reason,

In the individuals profile, click on the Timeline tab to open that view.

Find the received or removed entry in the timeline and hover your mouse over it.

Click the edit pencil and the original "Received by" or "Removed by" box will open, where you can change the date, reason and/or note.



Note: You also have the ability to delete the Received or Removed entry if it was entered by mistake. For the integrity of historical data, it is only recommended to delete entries if they are incorrect. If a person was a member for any length of time, please add a removal reason instead of deleting their membership reception entirely.

Membership Statuses Explained

Below is a list of the Membership Status possibilities for individuals in Church360° and the criteria that determine each one.

Displayed Status	Criteria Used
Member	• Marked as being received as a member in the Timeline section of the person record • Not marked as having been baptized • Not marked as having been confirmed • Not marked as being removed from membership in the Timeline section of the person record
Baptized Member	• Marked as being received as a member in the Timeline section of the person record • Marked as having been baptized • Not marked as having been confirmed • Not marked as being removed from membership in the Timeline section of the person record
Confirmed Member	• Marked as being received as a member in the Timeline section of the person record • Marked as having been confirmed • Not marked as being removed from membership in the Timeline section of the person record
Non-Member	• Not marked as being received as a member in the Timeline section of the

	person record OR • Marked as being received as a member in the Timeline section of the person record • Marked as being removed from membership in the Timeline section of the person record

Adding Photos to Profiles [New Profile View]

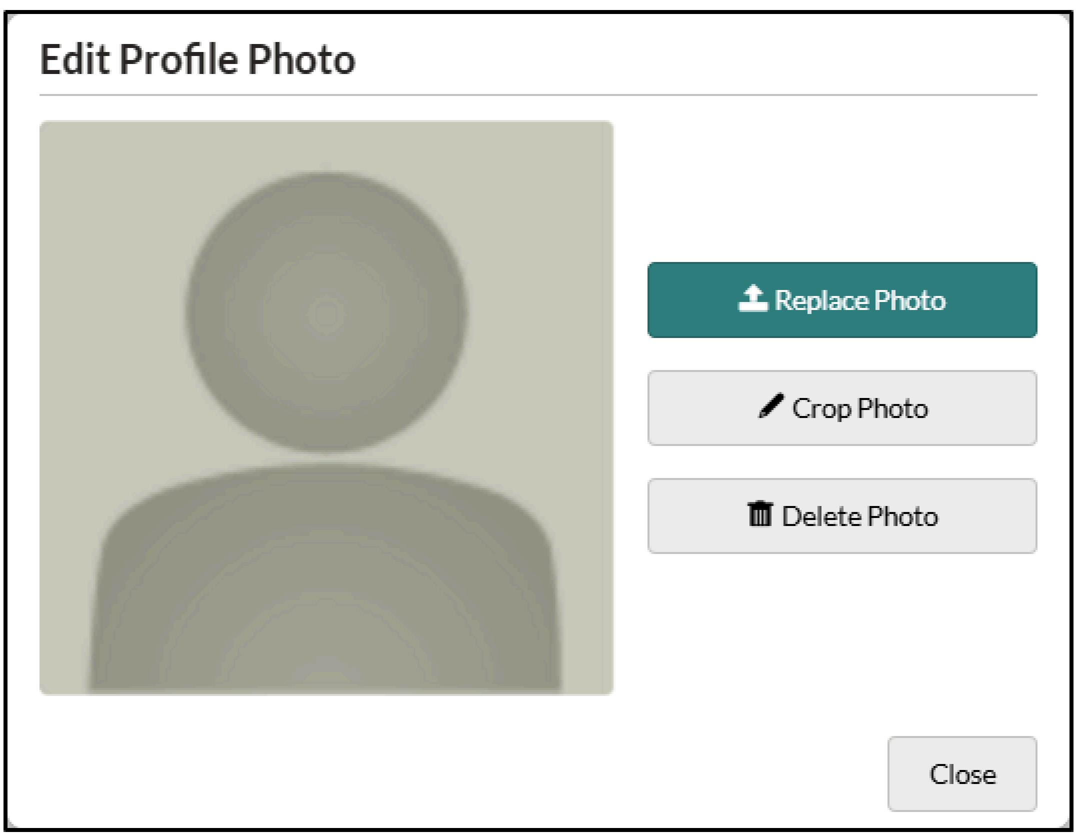
Images can be added to profiles or household profiles that can be viewed from the People view or included in directory downloads.

To add an image to a Profile

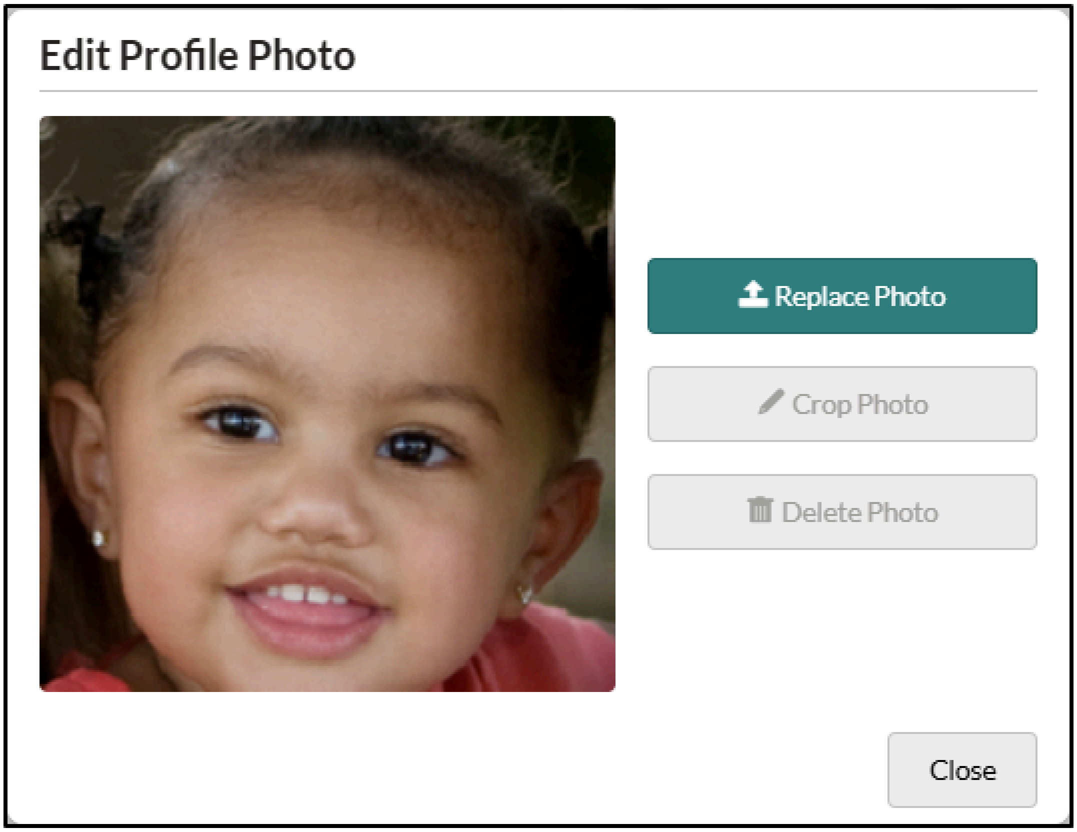
1. From the People view, click on the individual's name to open their profile.

2. On the right-hand side of the name banner across the top of the page, click Edit, and select Edit Profile Photo.

3. The Edit Profile Photo box will appear. Click Replace Photo to open your file explorer to find and choose the image you want. Church360° accepts JPEG, PNG, GIF, and BMP file types for profiles.



4. Once selected, you can use Replace Photo again to select a different photo, use Crop to crop or re-center your photo, or Delete Photo to remove your selection.

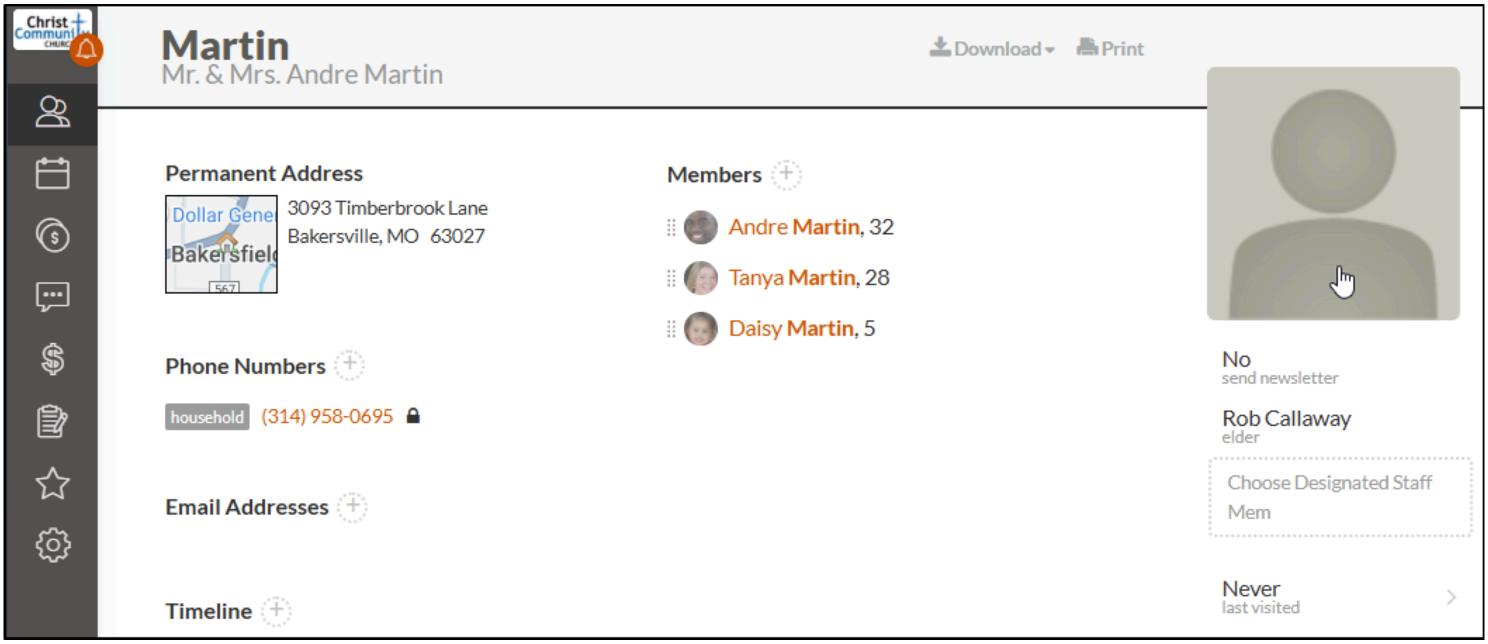


5. When you are satisfied with your photo, click Close.

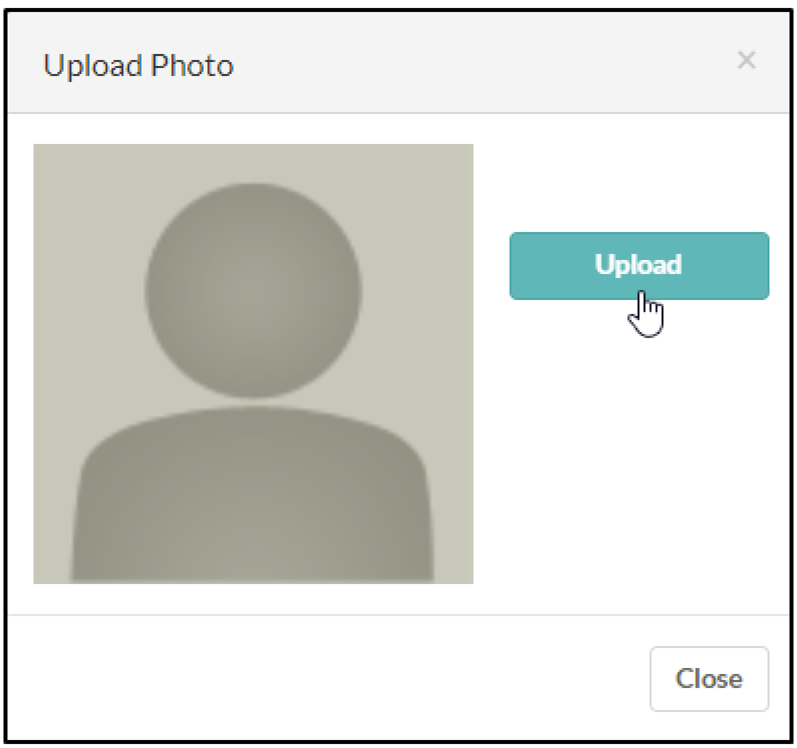
To add an image to a Household Profile

1. From the People>Household view, click a Household Profile to open it for editing.

2. Click the placeholder image at the top right of the Household Profile to open the upload window.



3. Click "Upload" to open your file explorer to find and choose the image you want. Church360° accepts JPEG, PNG, GIF, and BMP file types for profiles.

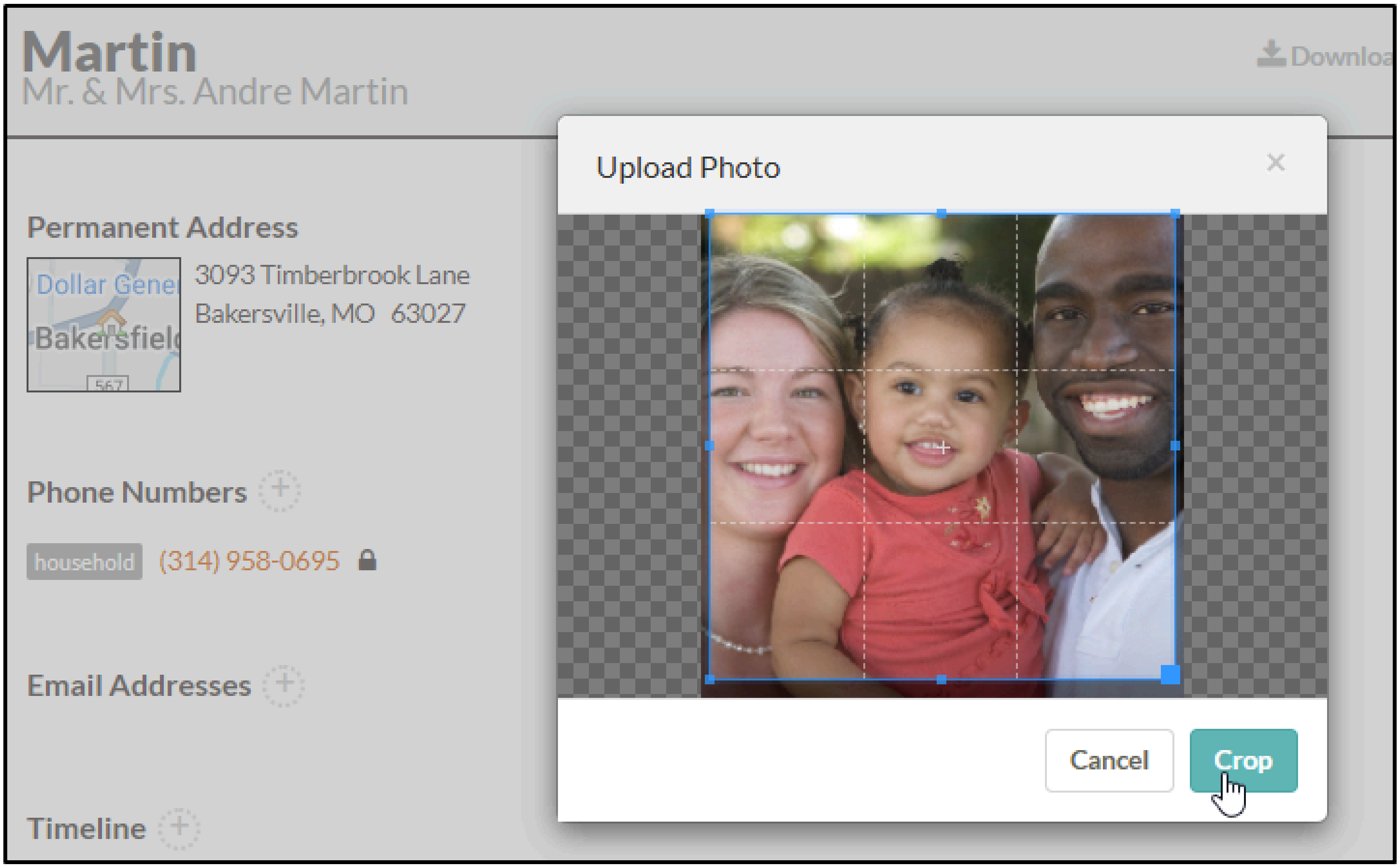


4. Once an image has been uploaded, three additional functions become available.

- The "Replace" button reopens your file explorer for you to find and choose a replacement for your current image.

- The "Crop" button opens an editing window where you can adjust and resize the cropping square around your image for a better fit. Click "Crop" again to save your change.

- The "Remove" button will remove the image from the field completely and will leave only the placeholder image.



5. Click "Close" to save your changes and close the upload window.

It's important to note that the type of directory you generate will determine whether the household or individual image are shown. If your directory is generated from People>Households mode, the image added to the household record will be available whereas directories generated from People>Individuals view will show the image from the person record.

Printing or Exporting Profiles [New Profile View]

If someone is transferring to another church, it could be helpful to print their Profile and Household Profile information to take with them to their new church. It can also be done to keep hard copies of members' information.

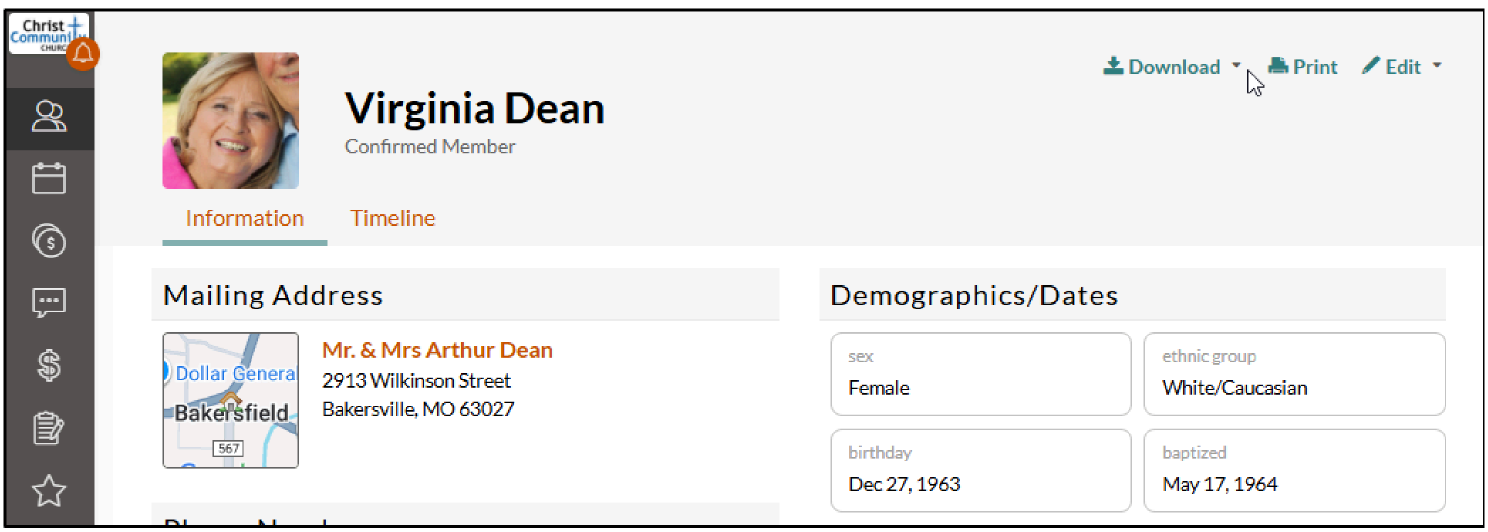
Note: Only fields and notes that are visible to the user printing the record will be included.

To print or export a Profile

1. Go to the People>Individuals view and click on the individual's name to open the profile.

2. On the right side of the Name banner at the top of the record:

- Click "Download" and select to export the record to a CSV or Excel file.
- Or click “Print” to open a print preview of the profile from which you can send it to a printer or save it as a PDF.



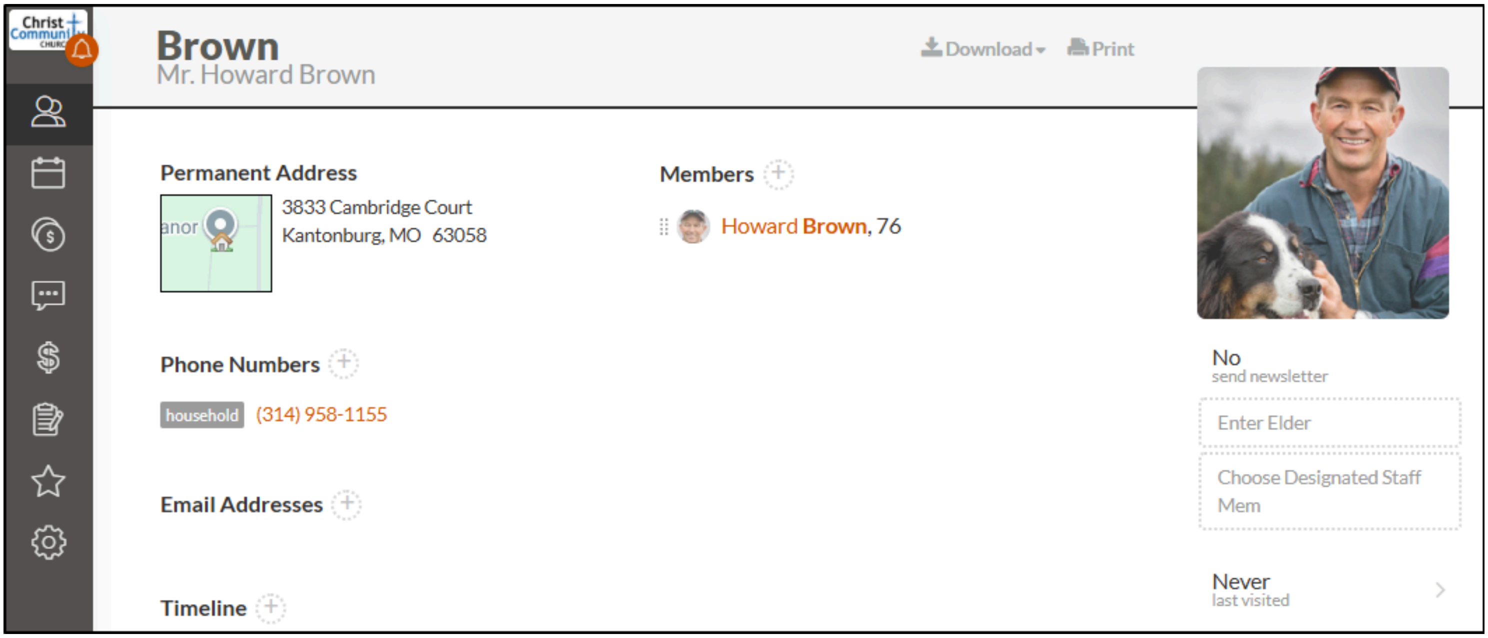
To print or export a Household Profile

1. Go to the People>Households view and click on the household name to open the Household Profile.

2. On the upper right of the profile, click to download or print the profile.

- Click "Download" to export the record into a CSV or Excel file.

- Click “Print” to open the record in a new browser tab. To print from the browser, press CTRL+P or right-click the page and choose “Print”.



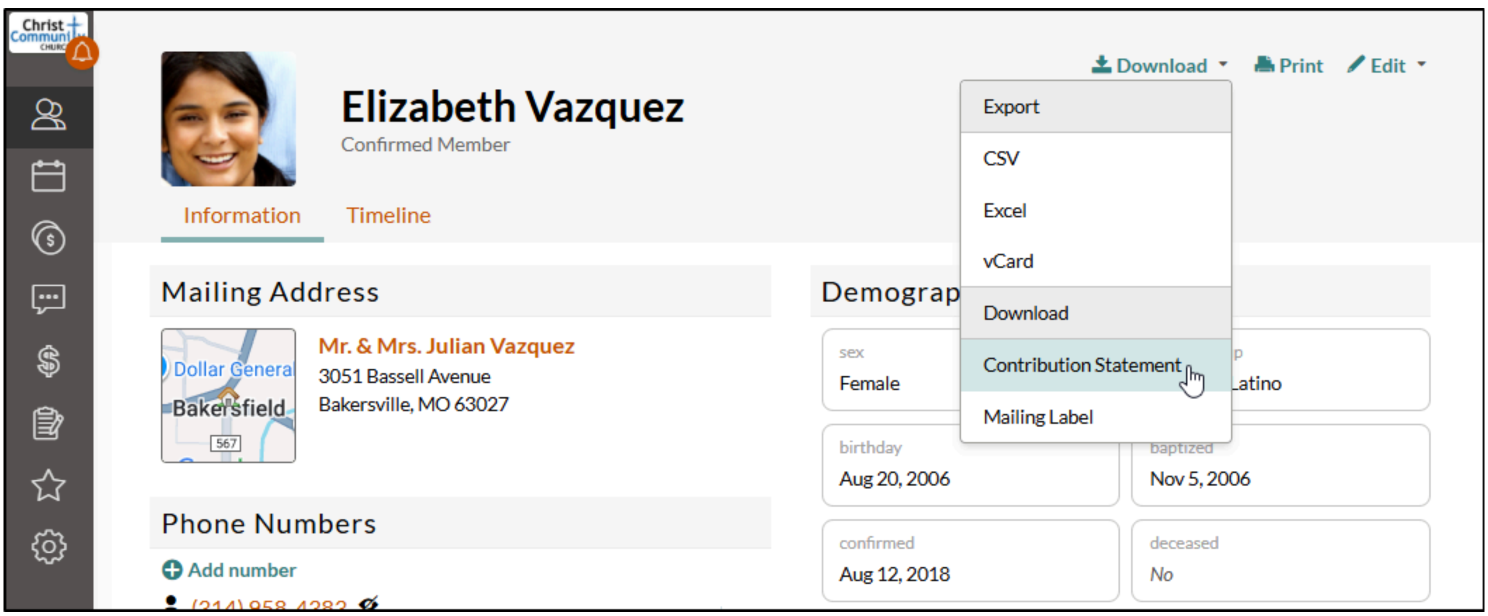
Printing Contribution Statements from the Profile View [New Profile View]

Individual contribution statements can be generated to a printable .pdf from a person's profile in Church360° Members.

This feature is the best option to print a contribution statement for only one individual (or a married couple giving jointly).

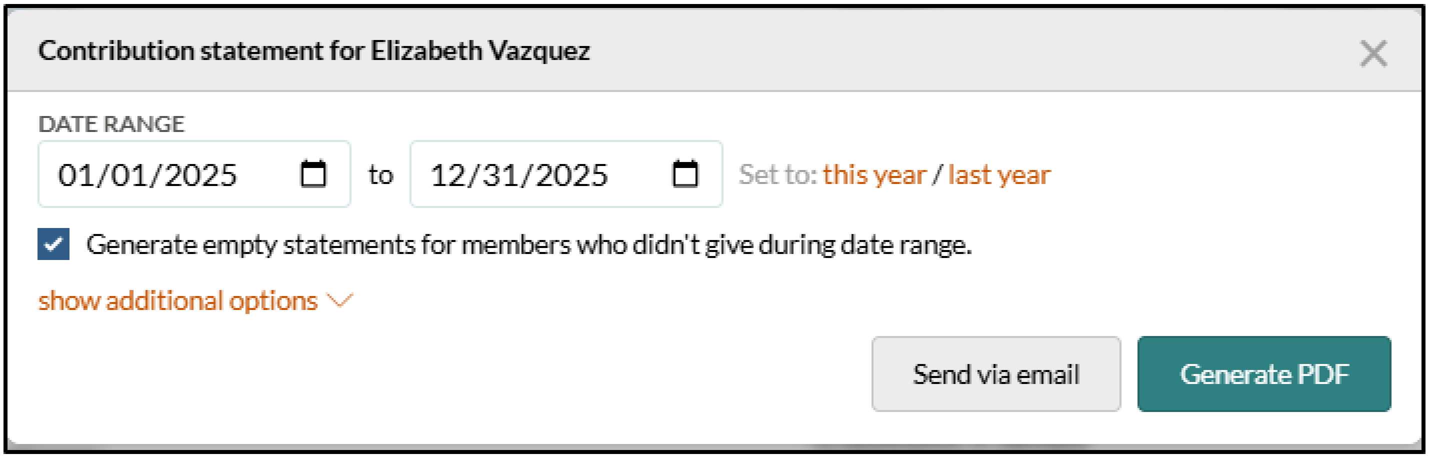
1. Go to the People view and click on either the individual or household name to open the profile.

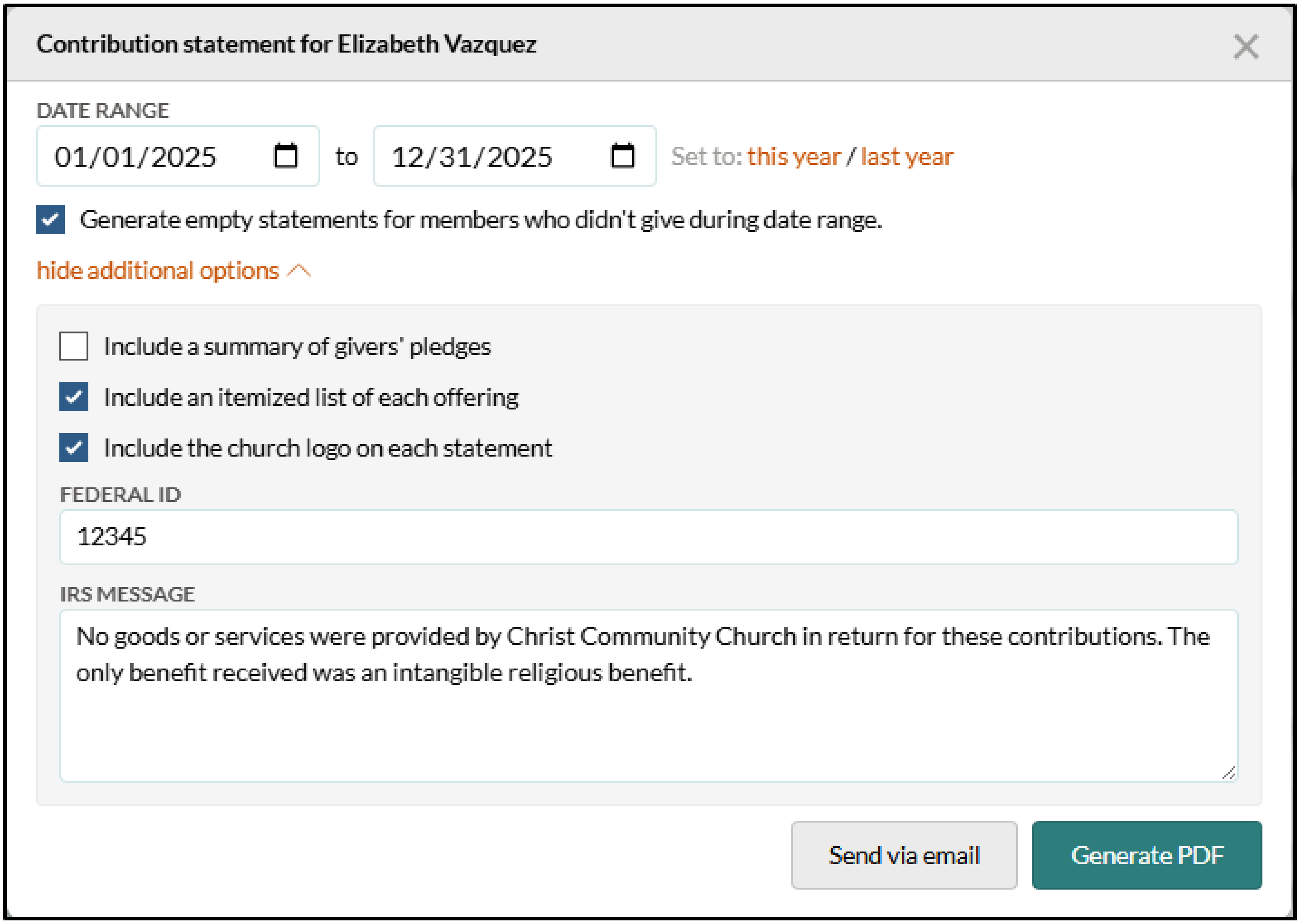
2. On the right of the Name banner, click "Download" to see all download options and choose "Contribution Statement".



3. In the setting window, choose the date range for the statement and whether an empty statement should be created if there are no offerings for this person within this date range.

4. Click "show additional options" if you wish to see other things you may wish to include or exclude on the statement.

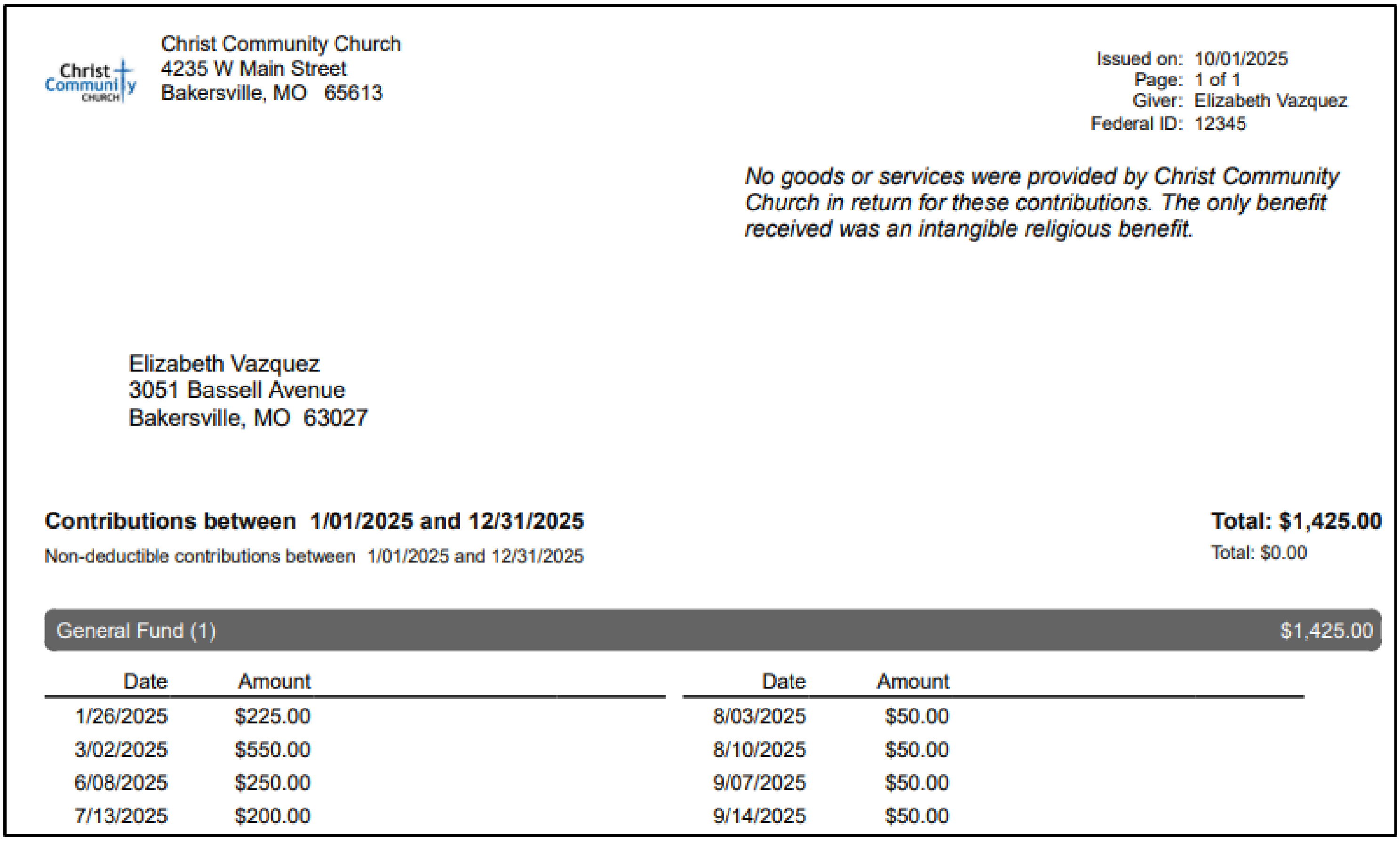




4. Click the “Generate PDF” button. The button will let you know when it is working and turn green when the statement is ready to download.

5. Click the green “Download” button to download your statement as a PDF that you can print.

A PDF file will be generated that you can print from your browser (use CTRL-P to open it to print).



Christ Community Church
4235 W Main Street
Bakersville, MO 65613

Issued on: 10/01/2025
Page: 1 of 1
Giver: Elizabeth Vazquez
Federal ID: 12345

No goods or services were provided by Christ Community Church in return for these contributions. The only benefit received was an intangible religious benefit.

Elizabeth Vazquez
3051 Bassell Avenue
Bakersville, MO 63027

Contributions between 1/01/2025 and 12/31/2025 **Total: $1,425.00**

Non-deductible contributions between 1/01/2025 and 12/31/2025 Total: $0.00

General Fund (1) $1,425.00

Date	Amount	Date	Amount
1/26/2025	$225.00	8/03/2025	$50.00
3/02/2025	$550.00	8/10/2025	$50.00
6/08/2025	$250.00	9/07/2025	$50.00
7/13/2025	$200.00	9/14/2025	$50.00

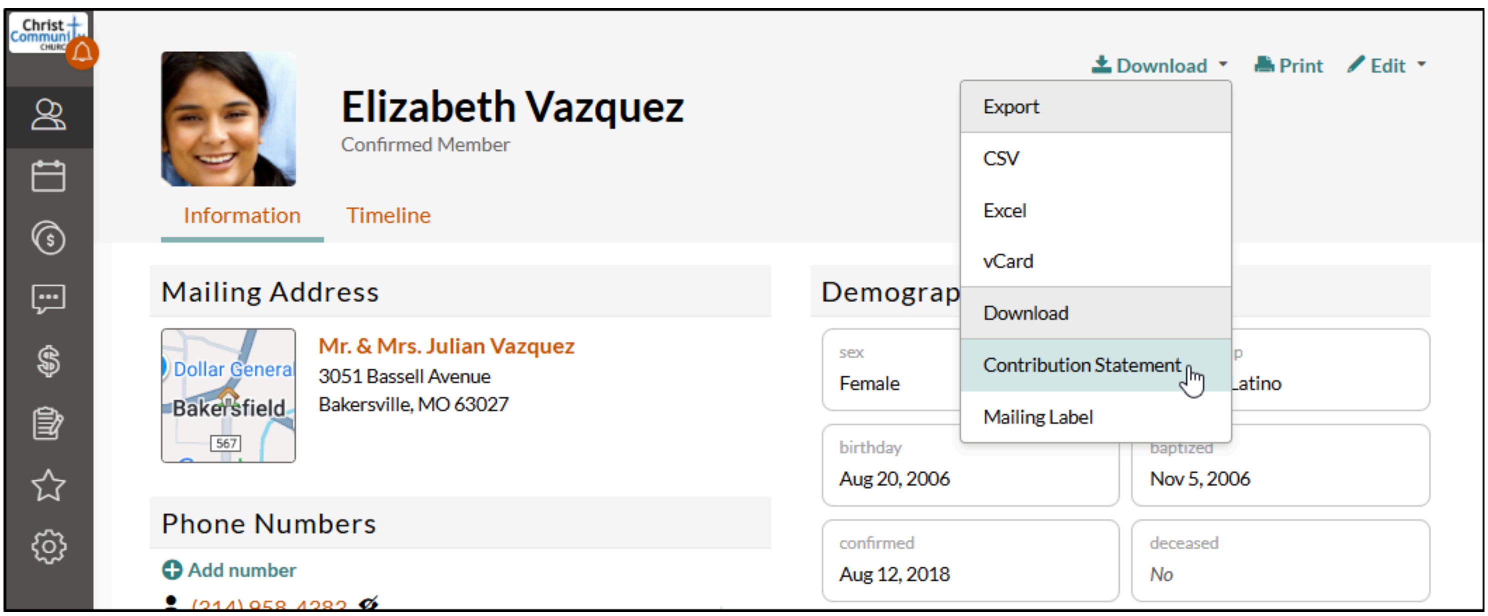
Printing Contribution Statements from the Profile View [New Profile View]

Individual contribution statements can be generated to a printable .pdf from a person's profile in Church360° Members.

This feature is the best option to print a contribution statement for only one individual (or a married couple giving jointly).

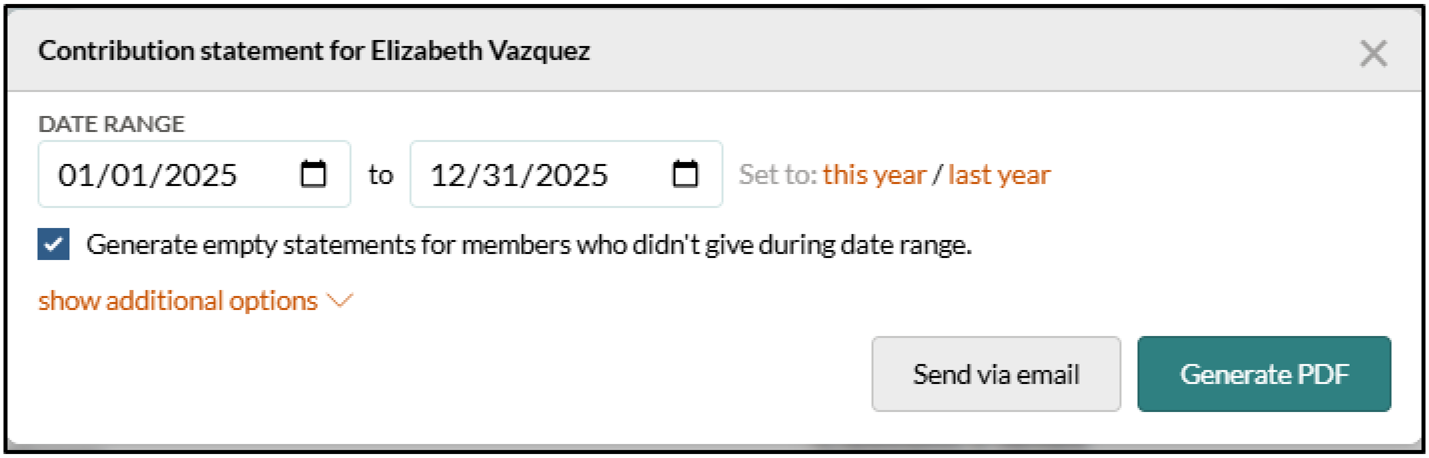
1. Go to the People view and click on either the individual or household name to open the profile.

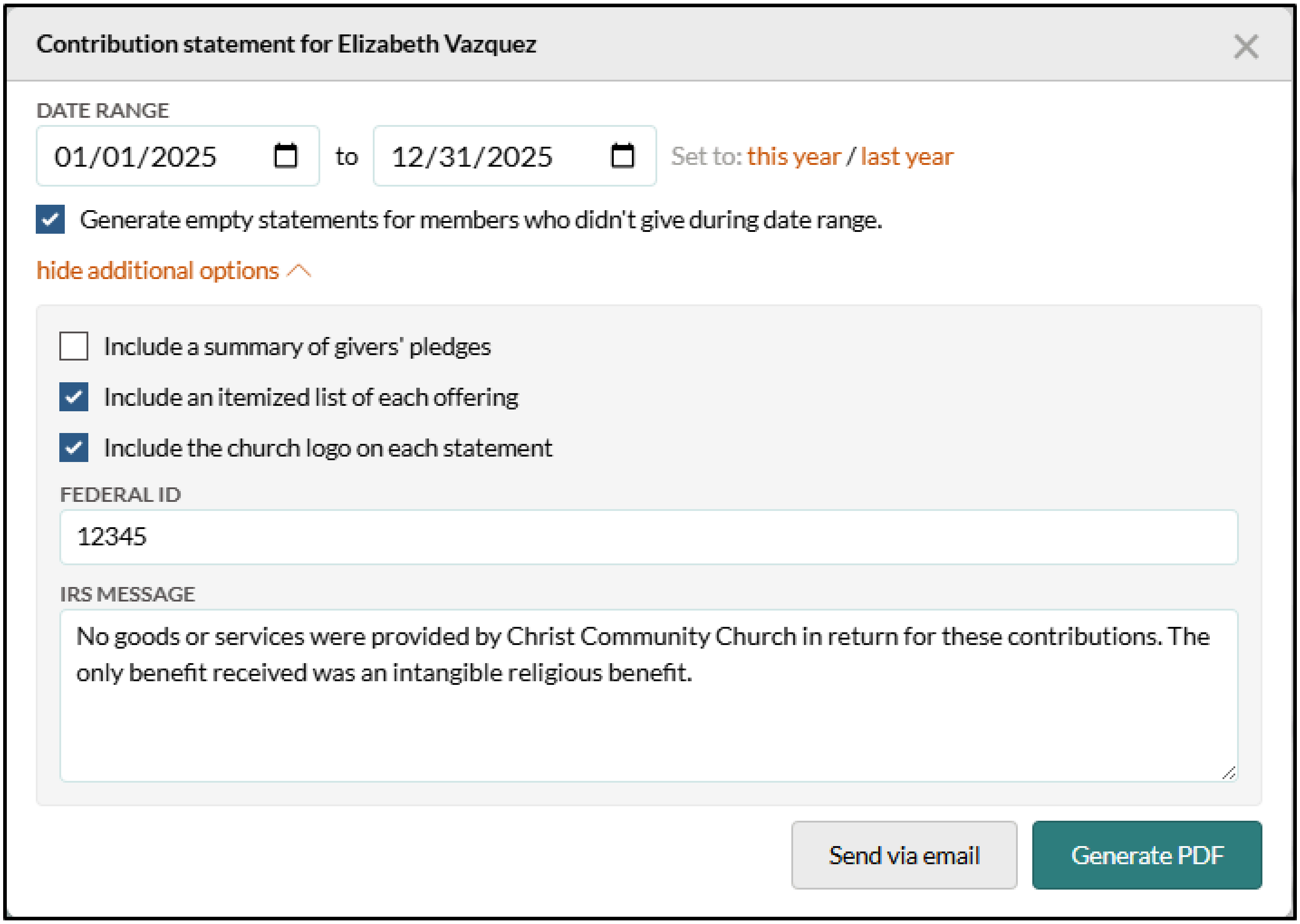
2. On the right of the Name banner, click "Download" to see all download options and choose "Contribution Statement".



3. In the setting window, choose the date range for the statement and whether an empty statement should be created if there are no offerings for this person within this date range.

4. Click "show additional options" if you wish to see other things you may wish to include or exclude on the statement.





4. 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.

5. Click the green "Download" button to download your statement as a PDF that you can print.

A PDF file will be generated that you can print from your browser (use CTRL-P to open it to print).

Christ Community Church
4235 W Main Street
Bakersville, MO 65613

Issued on: 10/01/2025
Page: 1 of 1
Giver: Elizabeth Vazquez
Federal ID: 12345

No goods or services were provided by Christ Community Church in return for these contributions. The only benefit received was an intangible religious benefit.

Elizabeth Vazquez
3051 Bassell Avenue
Bakersville, MO 63027

Contributions between 1/01/2025 and 12/31/2025 — **Total: $1,425.00**

Non-deductible contributions between 1/01/2025 and 12/31/2025 — Total: $0.00

General Fund (1) — $1,425.00

Date	Amount	Date	Amount
1/26/2025	$225.00	8/03/2025	$50.00
3/02/2025	$550.00	8/10/2025	$50.00
6/08/2025	$250.00	9/07/2025	$50.00
7/13/2025	$200.00	9/14/2025	$50.00

Emailing Contribution Statements from the Profile View [New Profile View]

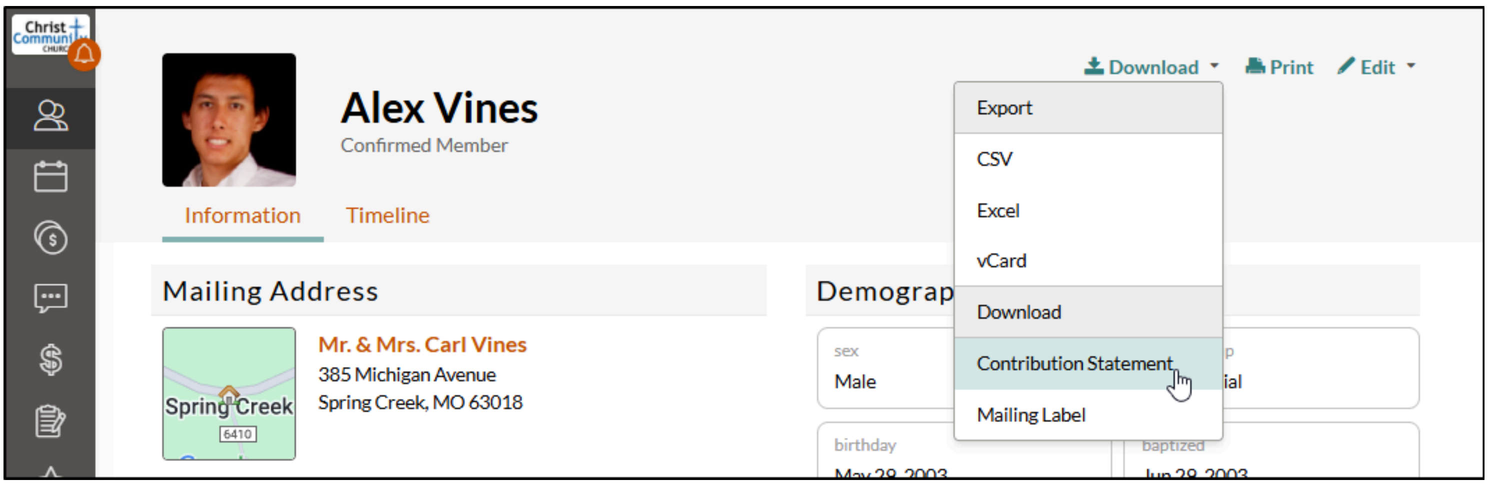
Individual contribution statements can be emailed from a person's profile in Church360° Members.

This feature is the best option to email a contribution statement for only one individual (or a married couple giving jointly).

To email an individual their contribution statement,

1. Go to the People view and click on either the individual or household name to open the profile.

2. On the right of the Name banner, click "Download" to see all download options and choose "Contribution Statement".



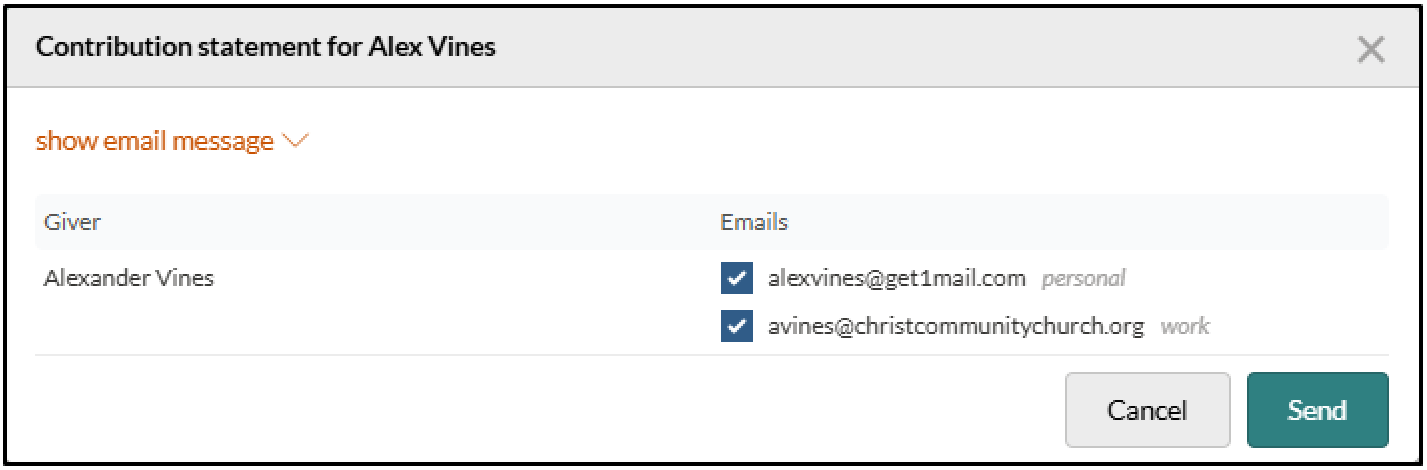
3. In the setting window, choose the date range for the statement and whether an empty statement should be created if there are no offerings for this person within this date range.

3. In the setting window, choose the date range for the statement and whether an empty statement should be created if there are no offerings for this person within this date range.

4. Click "show additional options" if you wish to see other things you may wish to include or exclude on the statement.

5. Click "Send via Email" button to prepare your statements for email.

6. Select which of the available email addresses should receive the statement and click "Send." The statement will then be emailed to the contributor.



Generating a Mailing Label for an Individual [New Profile View]

To print a mailing label for one individual,

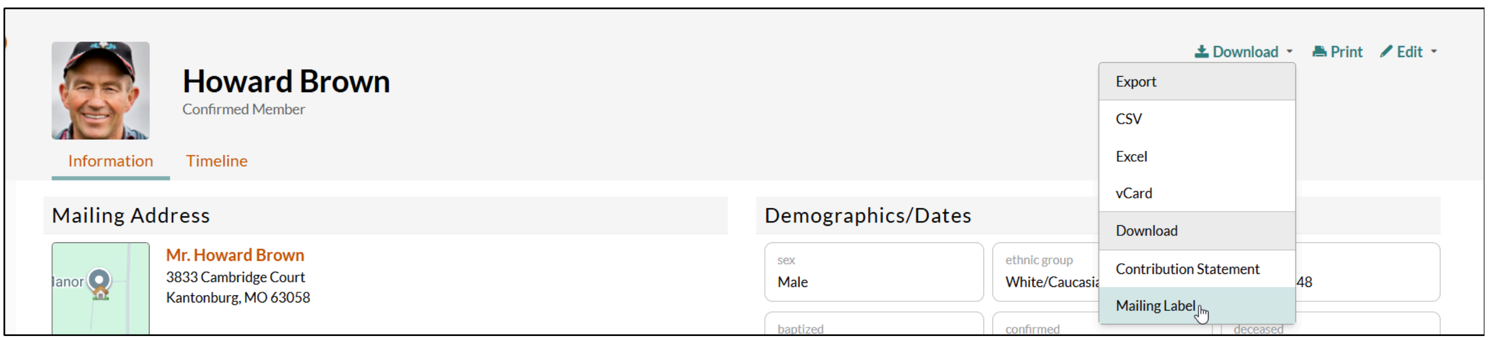
1. Go to the People view and click on either the individual or household name to open the profile.

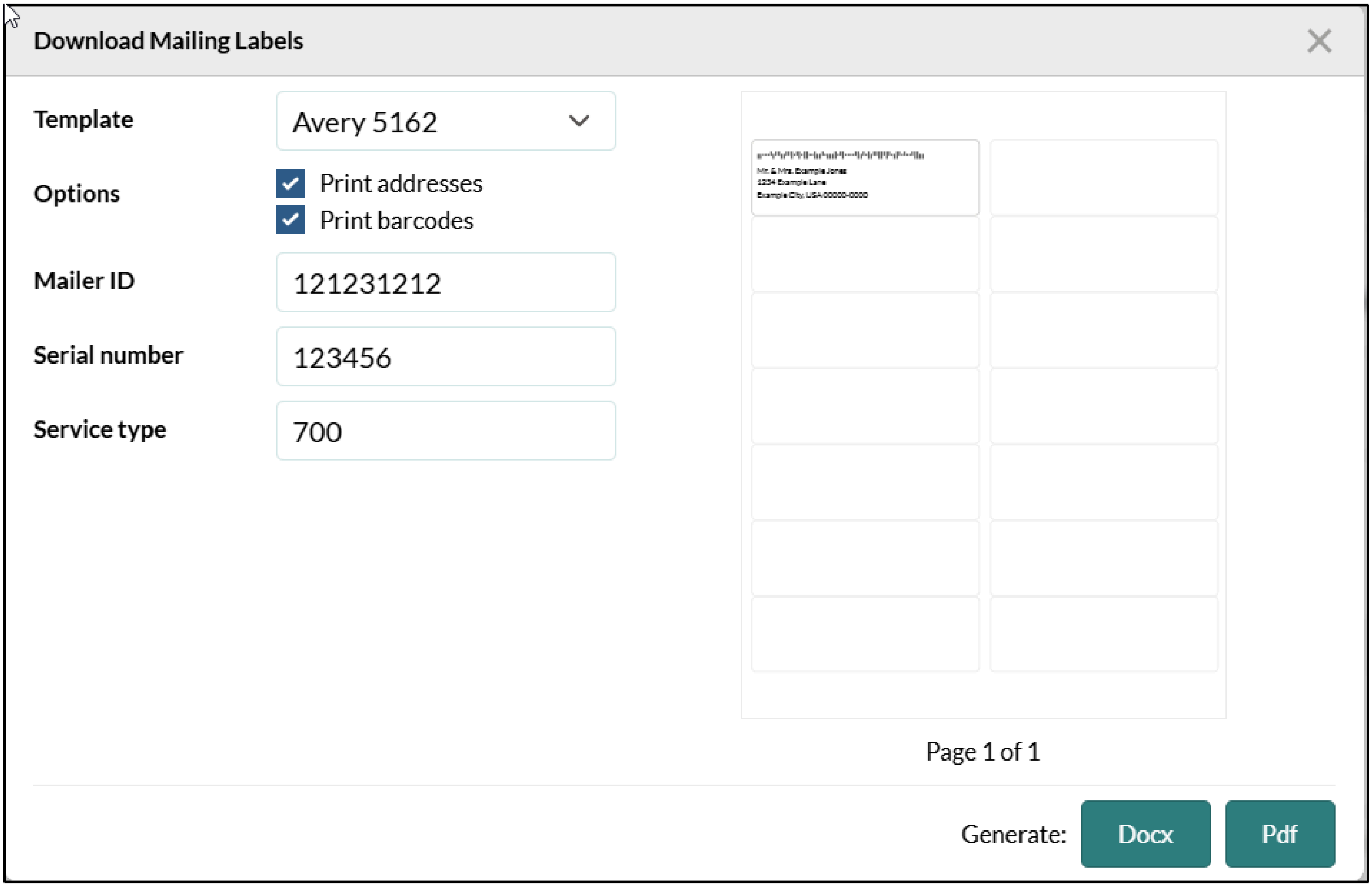
2. On the right of the Name banner, click "Download" to see all download options and choose "Mailing Label".

3. Select the label type you use under Template, and check the option boxes you want to use. If you are using bar codes, fill in the information below.

4. Click the button for the type of file you want to generate, and then click Download.

5. Open the file and print it.




Download Mailing Labels
Template
Avery 5162
Options
Print addresses
Print barcodes
Mailer ID
121231212
Serial number
123456
Service type
700
Mr. & Mrs. Example Jones
1234 Example Lane
Example City, USA 00000-0000
Page 1 of 1
Generate:
Docx
Pdf


Download Mailing Labels
Download

Updating Household Addresses [New Profile View]

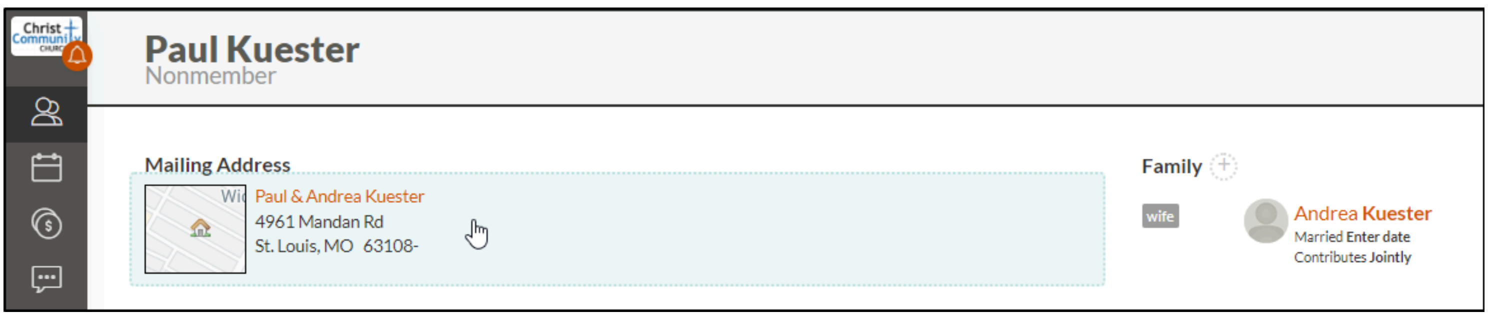
When a person or family moves, you'll want to update the address information in their household record to maintain accuracy for your directory and label reports.

If you want to keep the current address but add an additional address, you may instead want to add an away address to their household or individual profile. For more information on adding away addresses, please visit [this article].

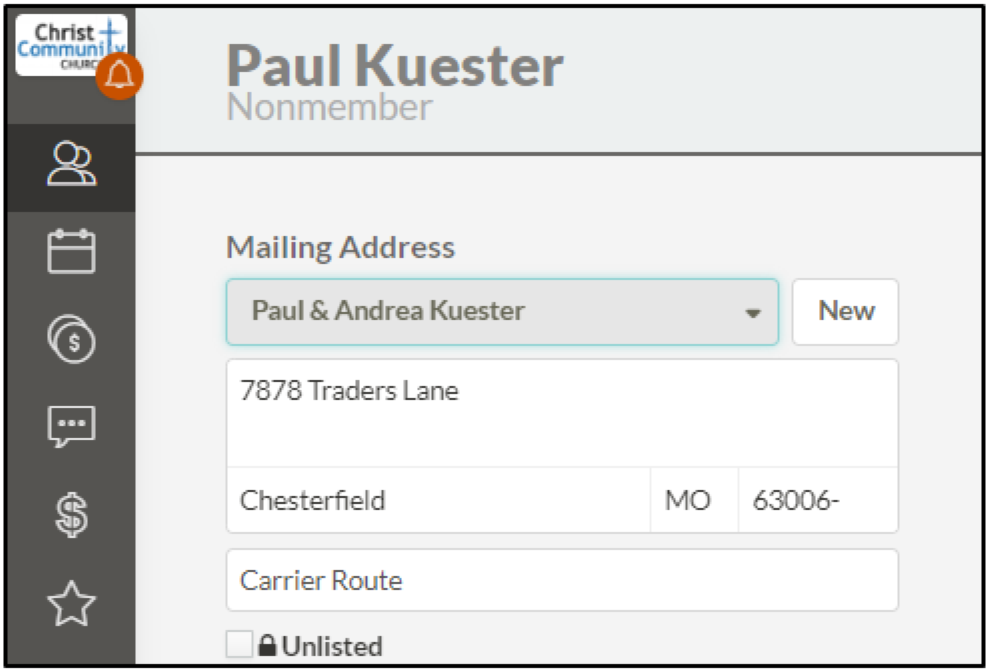
To add or edit a household's address,

1. Select the profile of the household from the People view.

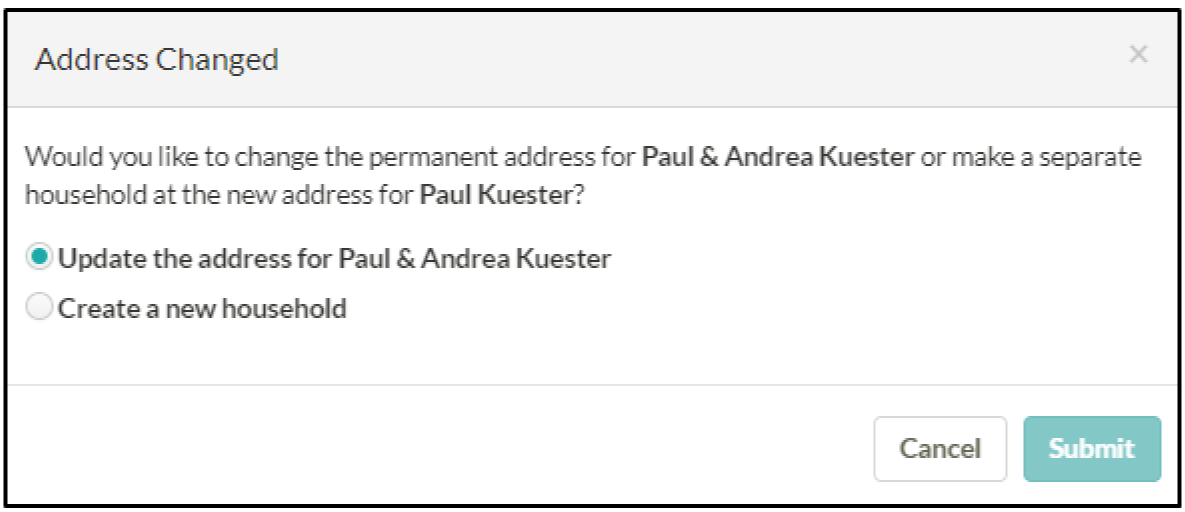
2. Click the Permanent Address section to open it for editing. The section should highlight in a faint blue when you hover over it.



3. Edit the address as you need. If the family would like their address to be private, check the box to unlist it.



4. Click anywhere in the white space on the record to automatically save your changes. If this change was done from an individual's record, a window will appear asking if the address should be updated for the entire household or if a new household with the changes should be created for only this person.

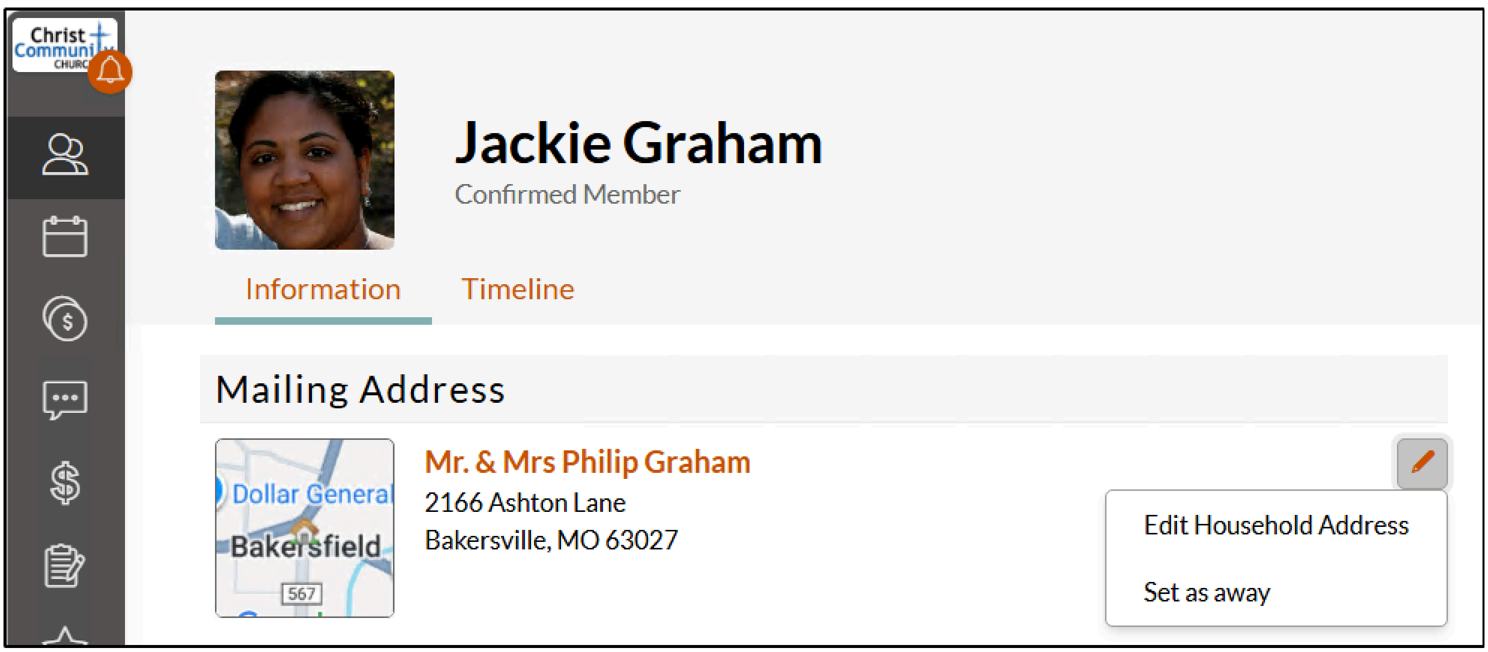


Adding an Away Address for an Individual [New Profile View]

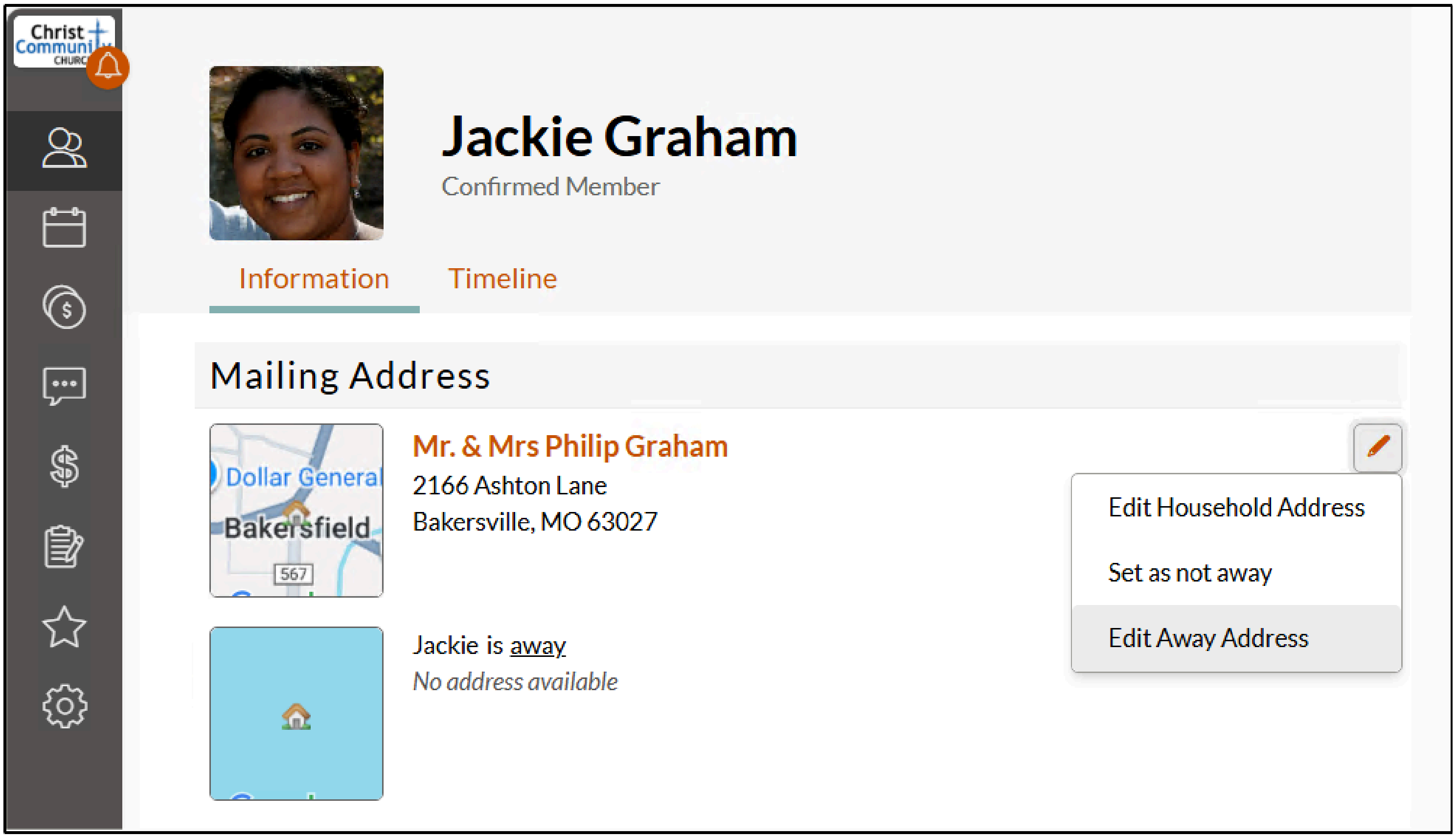
Some members of your congregation may spend a certain amount of time at a different location that you may want to keep track of. Whether it's snowbirds, college kids, or deployed military, you can add an away address and date range in addition to their regular mailing address. Away addresses can also be toggled on or off manually or you can set a date range to expire automatically.

To add an alternate/away address for an individual,

1. From the People>Individuals view, click on the name of the person in question to open their profile.
2. Hover your mouse over to the Mailing Address section and click on the pencil.
3. Select "Set as away".

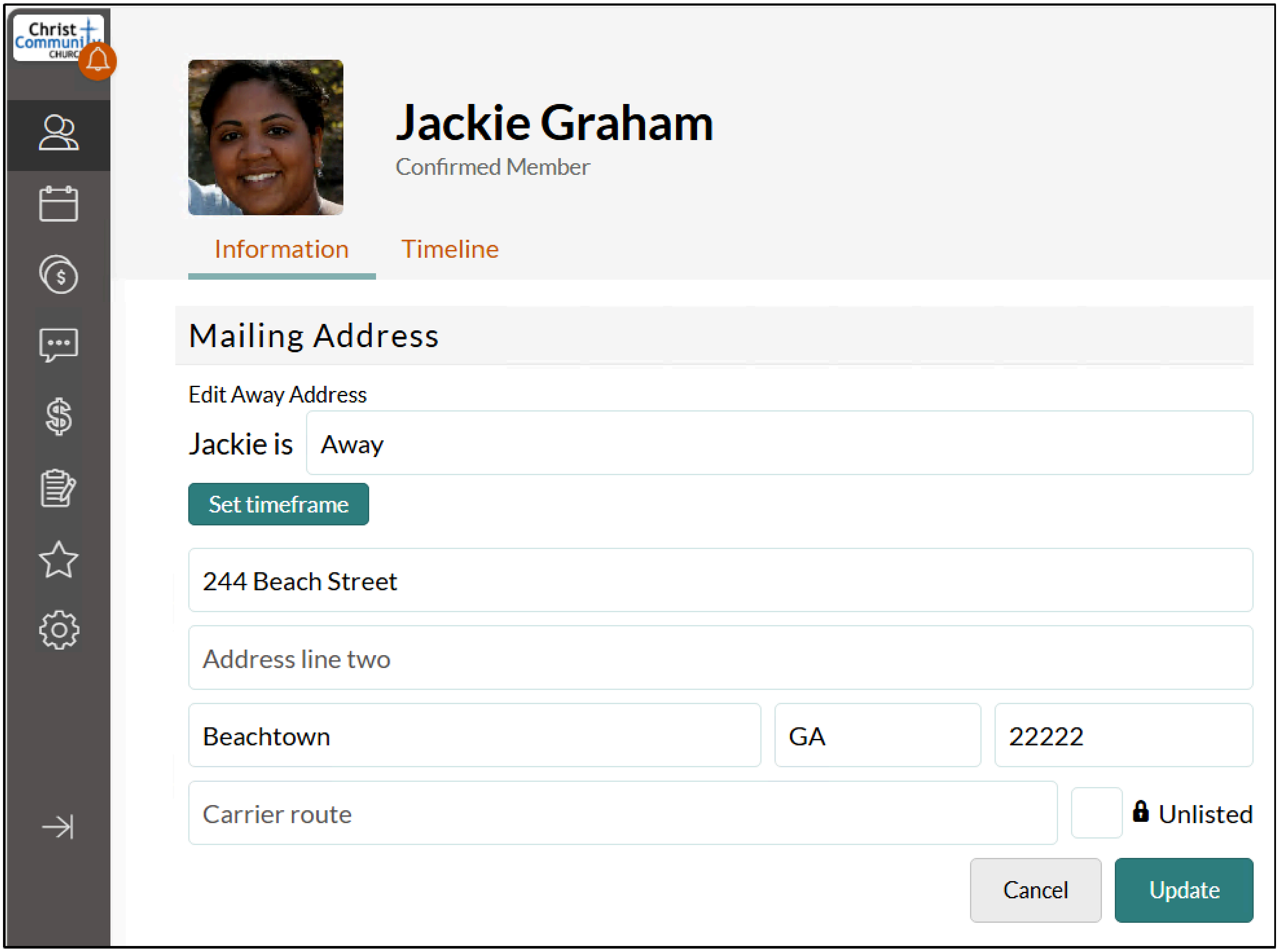


4. Once the person is set as "away", click the pencil again and select "Edit Away Address".



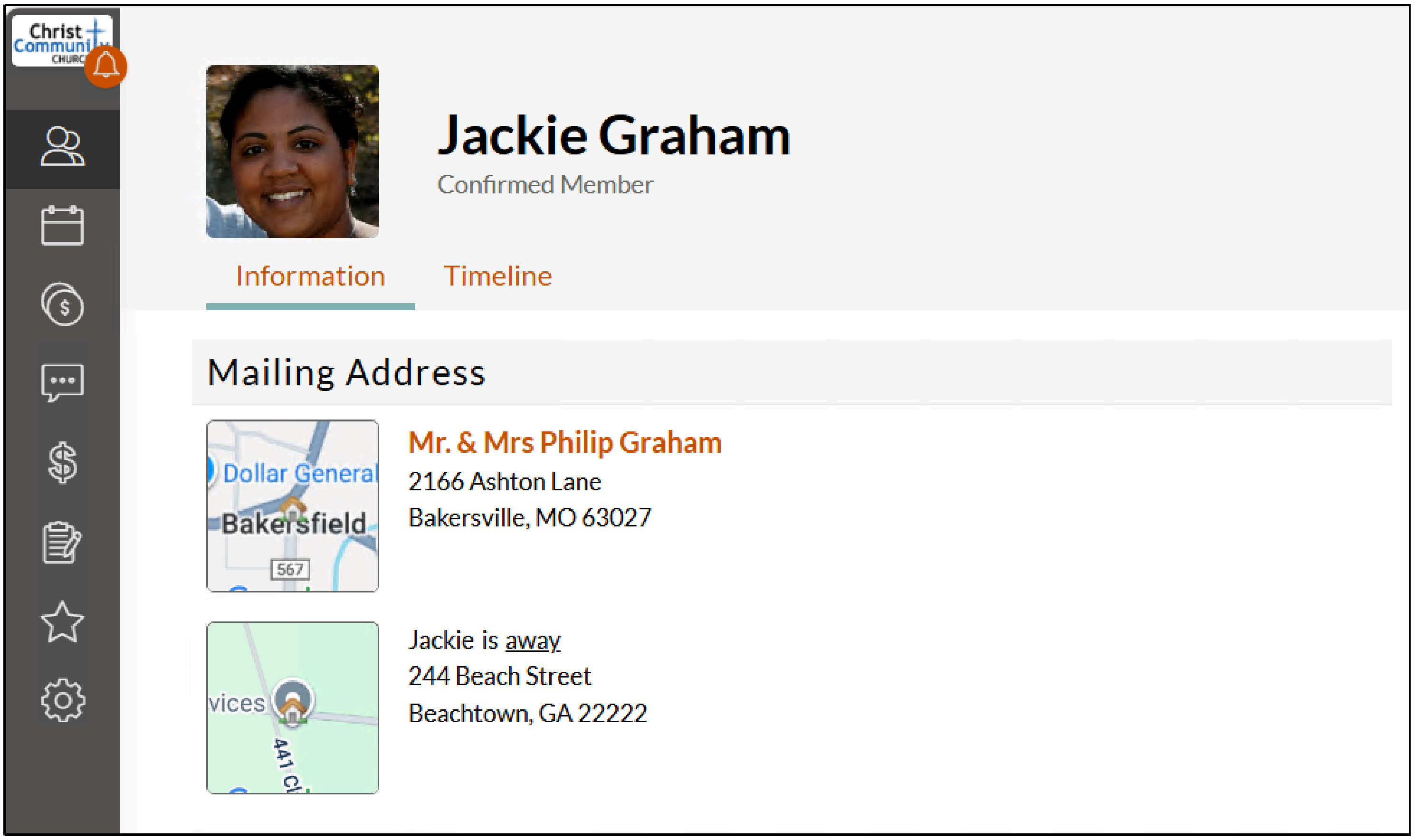
5. Here you can add their alternate address.

- In the first box, you can change it so that instead of Away, the person's profile says something else, like "Deployed" or "At school".
- If you'd like to add a date range for when this person will be away, click "Set timeframe" and use the boxes provided to set a start and end date that the person will be using this address.
  - You can leave the year fields empty for the date range to make the address recurring.
    - If you do not know how long the person will be away, you can skip this step and simply set them to "not away" when they return.
- Enter the address they will be using while they are away.
- Check the Unlisted box if you don't want this address to be printed on directories.



6. When everything looks good, click Update to save.

7. Now below the address they share with their household, you will see a message that this person is away, along with their away address.


Christ Community Church
Jackie Graham
Confirmed Member
Information
Timeline
Mailing Address
Dollar General
Bakersfield
567
Mr. & Mrs Philip Graham
2166 Ashton Lane
Bakersville, MO 63027
vices
441 Cl
Jackie is away
244 Beach Street
Beachtown, GA 22222

Updating Contact Information [New Profile View]

To ensure the ability for your church to reach your congregation, you will want to maintain accurate contact information for your records.

Depending on your needs, contact information can be added for both an individual person and their entire household. Phone numbers and emails added to a household will be reflected on an individual's record (marked as "household"), but contacts for each member are not visible on the household record.

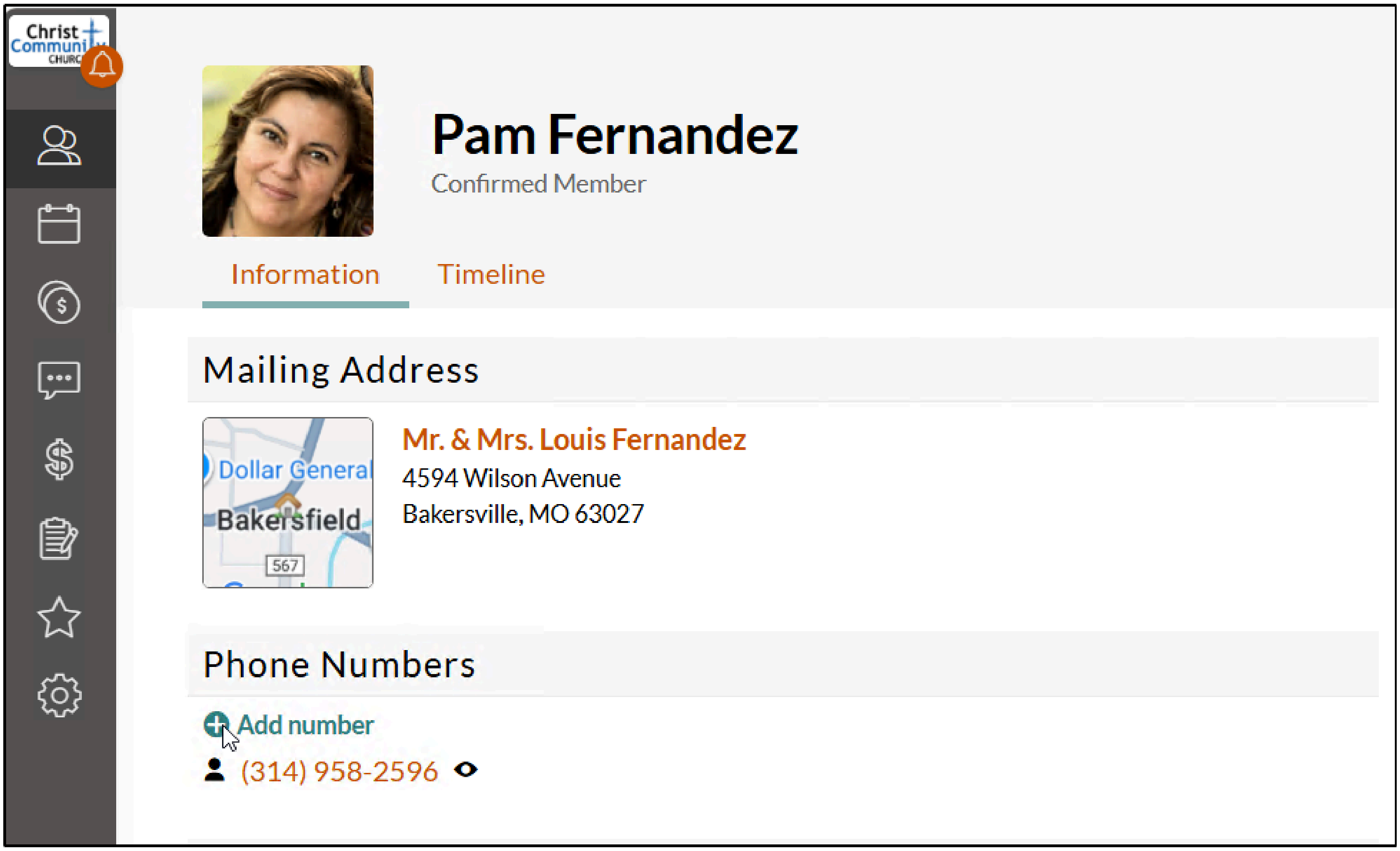
Note: If this person is going to be invited to create a login for your Church360° Members site, you will want to make sure they have at least one email listed as a personal or work email for the login to be created.

To add a phone number,

1. From the People view, click on the individual's name to open the profile.

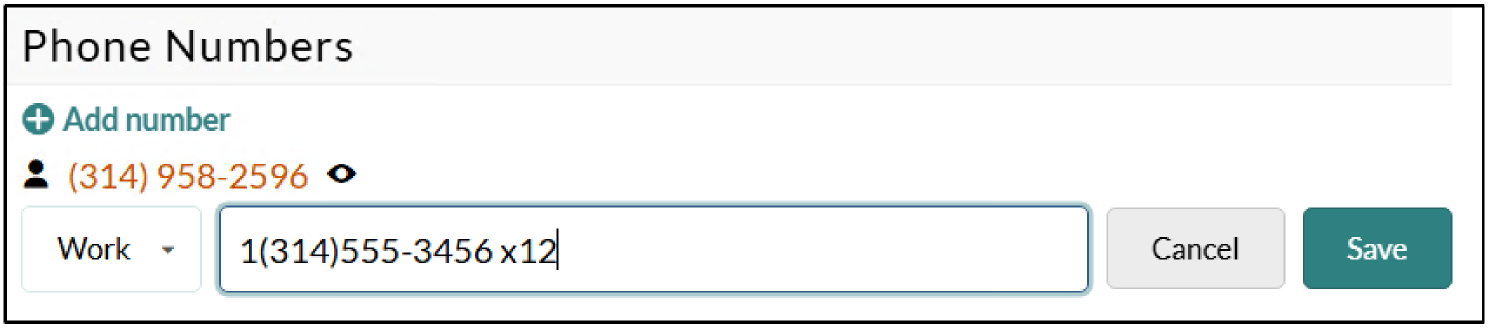
2. Phone numbers are located on the left of the page below the Address section.

3. Click the plus sign next to "Add number" to add a new entry.



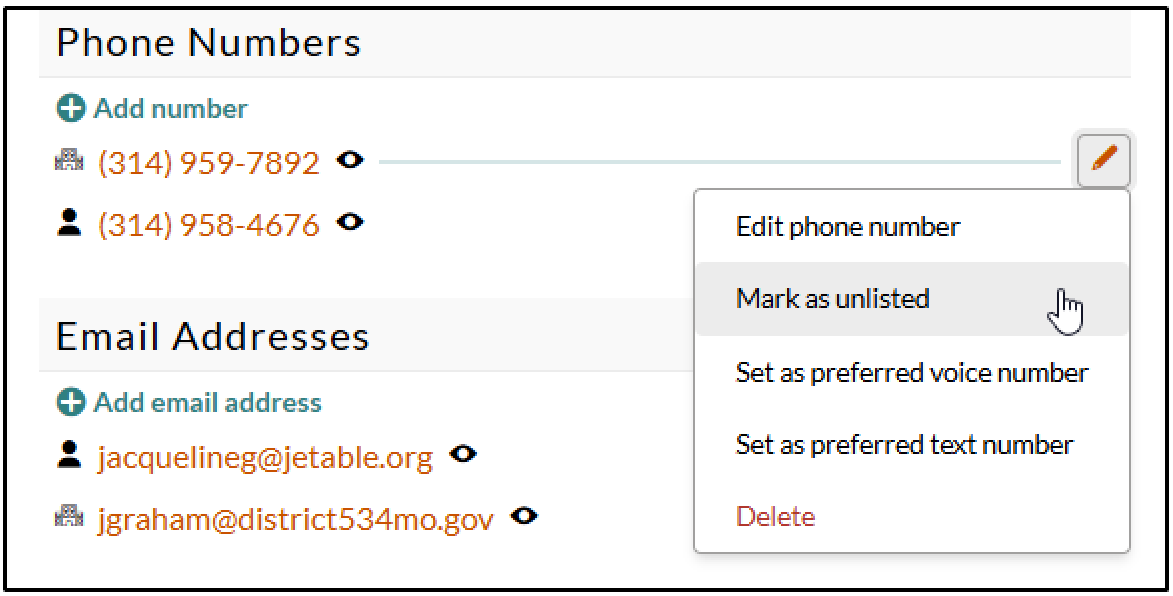
4. Use the drop-down menu to mark the contact as home, work, or cell.

5. Type in the eleven-digit phone number, including the country and area code, if possible. All additional digits will be added as an extension.



6. Click Save to save your changes.

7. If you don't want this number to show on any directories, you can mark it as Unlisted by editing after saving and selecting that option in the drop-list.

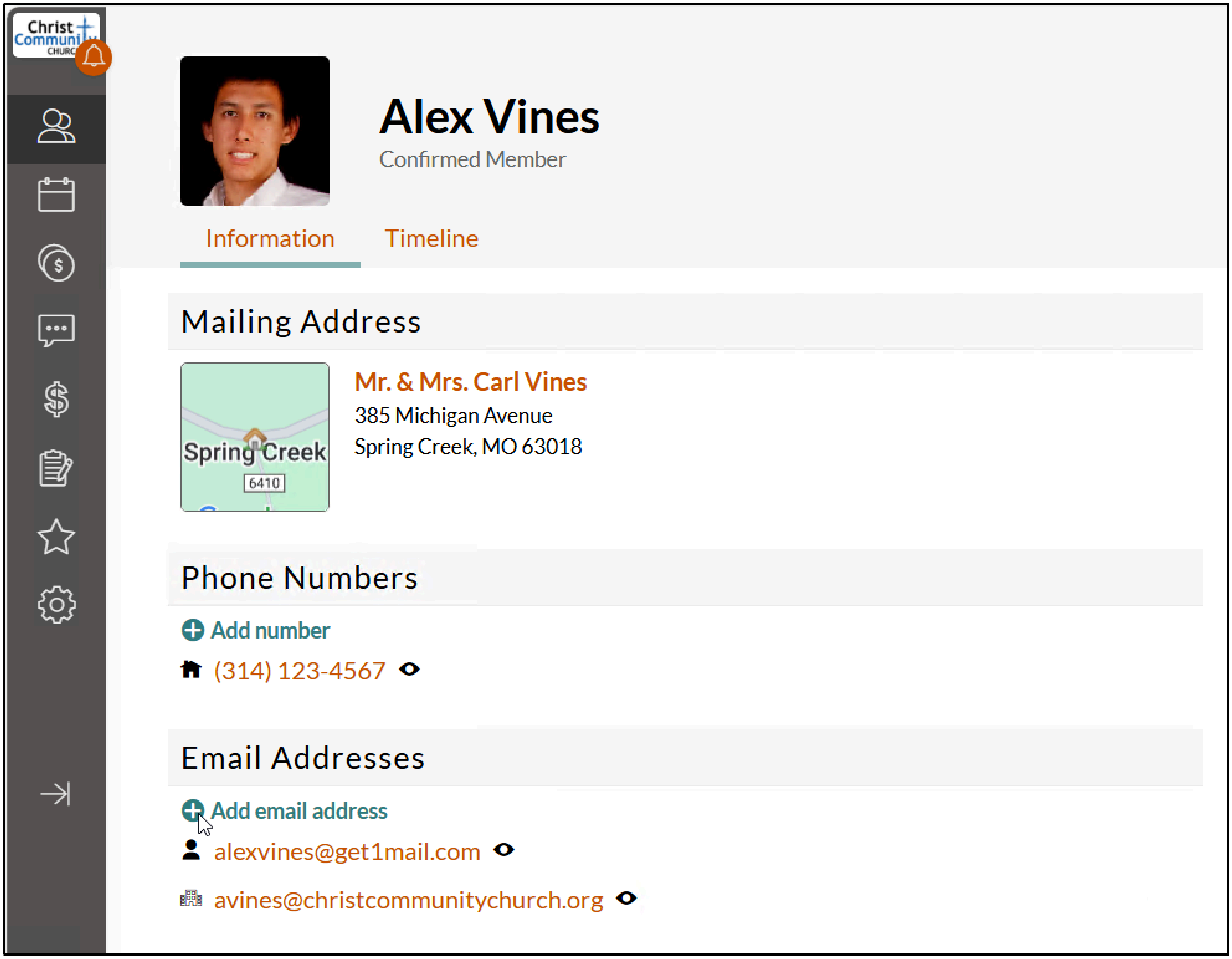


To add an email address,

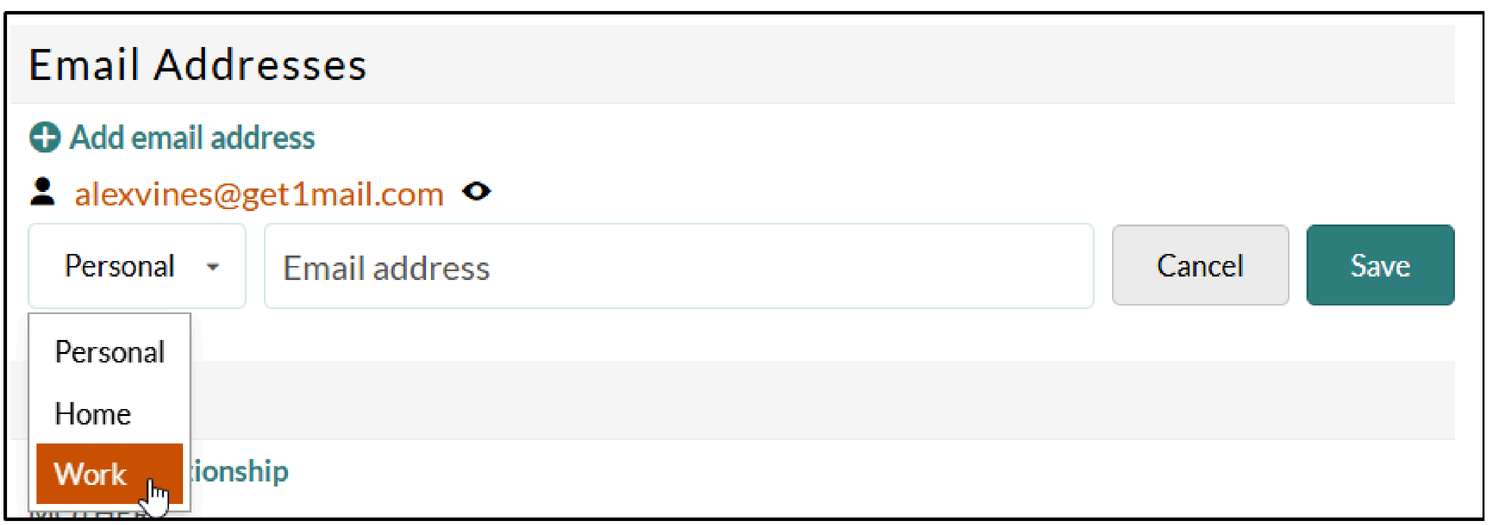
1. From the People view, click on the individual's name to open the profile.

2. The Email Addresses section is located on the left of the page below the Phone Numbers.

3. Click the plus sign next to "Add email address" to add a new entry.



4. Use the drop-down menu to mark the contact as home, work, or personal (for person records) or household.



5. Type in the email address. Any addresses without an "@" symbol or dot extension will not be validated and will not be available for emailing within the software.

6. Click Save to save your changes.

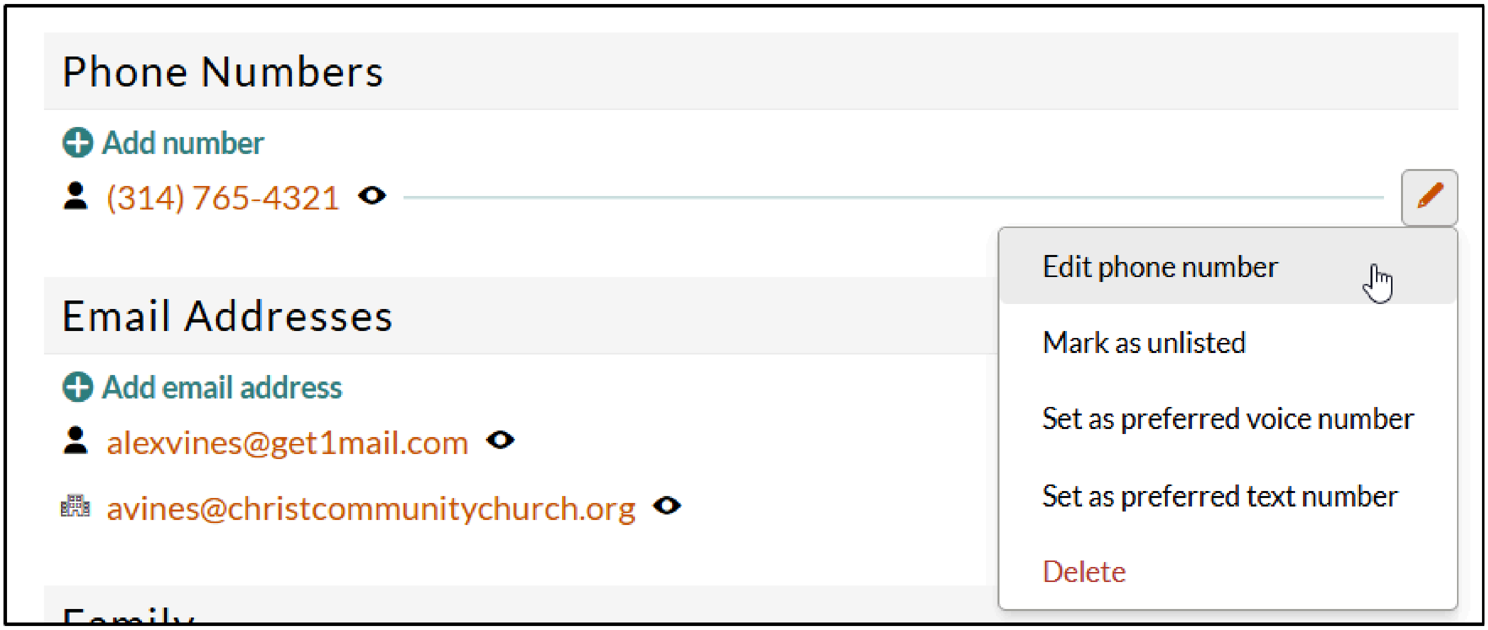
7. If you don't want this number to show on any directories, you can mark it as Unlisted by editing after saving and selecting that option in the drop-list.

To edit a contact,

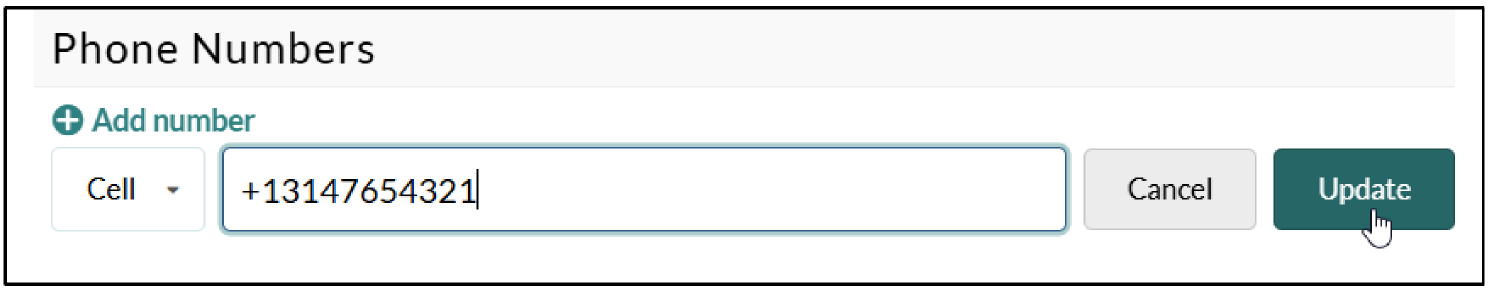
1. Click the household or person name to open the record for editing.

2. Hover your mouse over the phone number or email address you wish to edit and click the pencil icon.

You will see a list of options. Click to edit the phone number or address in question.



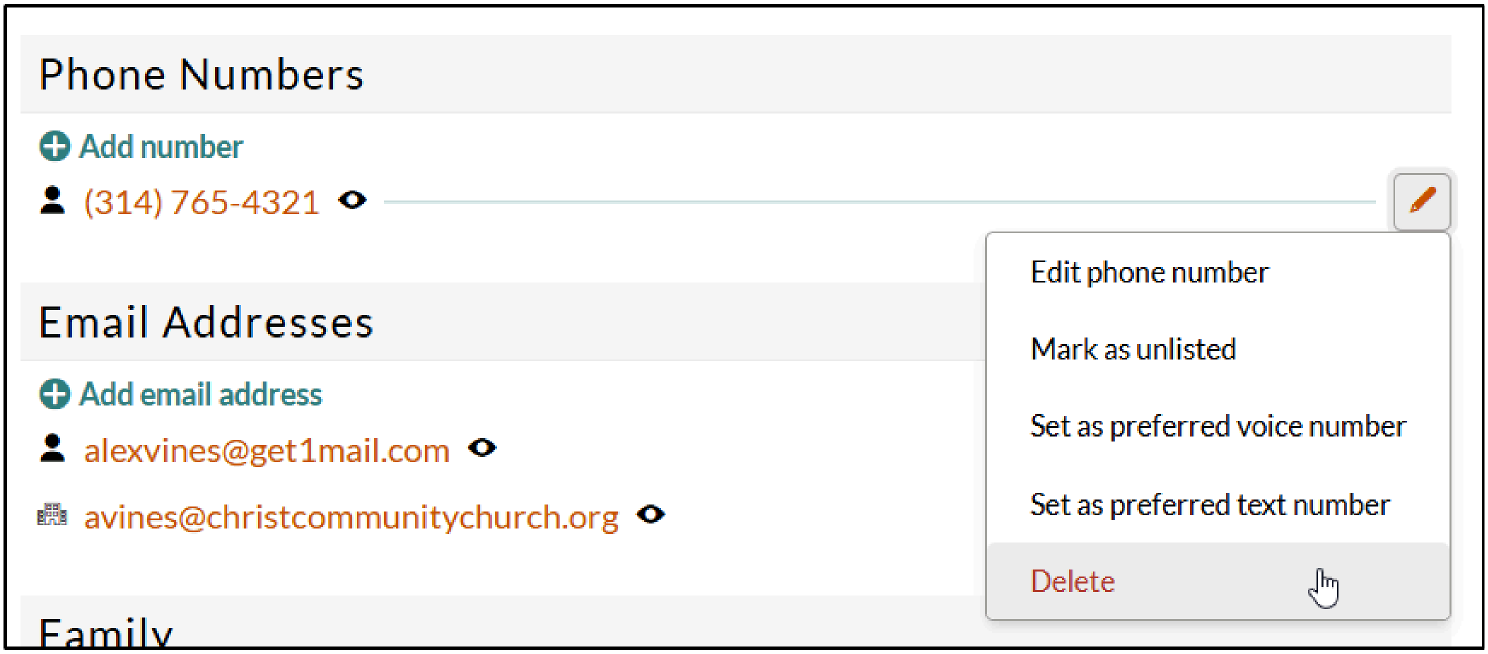
3. Then make your edits, and click Update to save your changes.



To remove a contact,

1. Hover over the contact you want to remove and click the Edit pencil.

2. Select Delete.


Phone Numbers
Add number
(314) 765-4321
Edit phone number
Mark as unlisted
Set as preferred voice number
Set as preferred text number
Delete
Email Addresses
Add email address
alexvines@get1mail.com
avines@christcommunitychurch.org
Family

Add, Edit or Delete a Relationship [New Profile View]

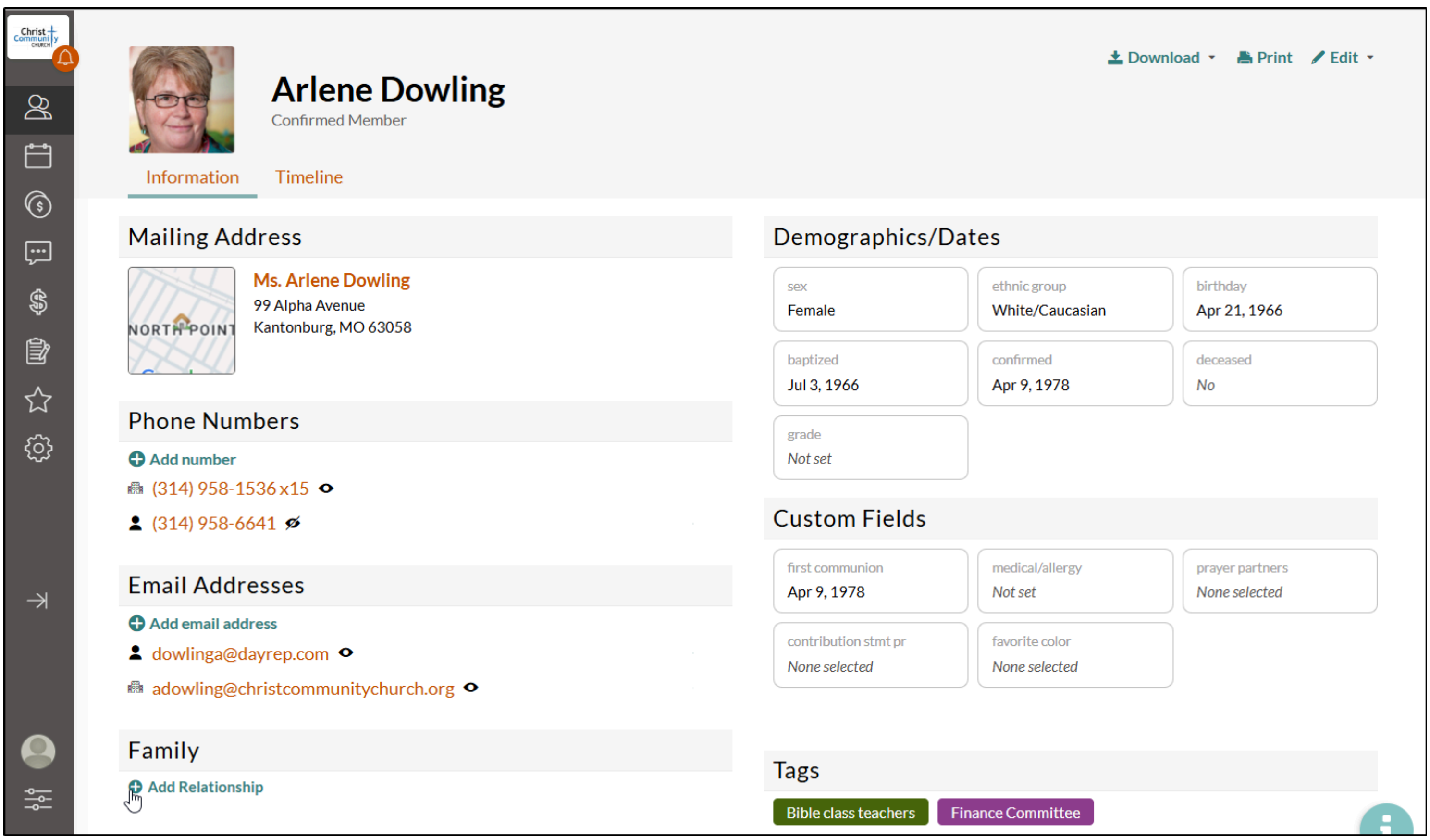
Familial relationships such as parents and children, siblings, spouses, etc., can be set from within the profile of one of the related members.

To establish a new relationship link,

1. From the People's view, click on the individual for whom you wish to add a relationship.

2. The Family section is on the left-hand side of the Information tab, below the Email Addresses section.

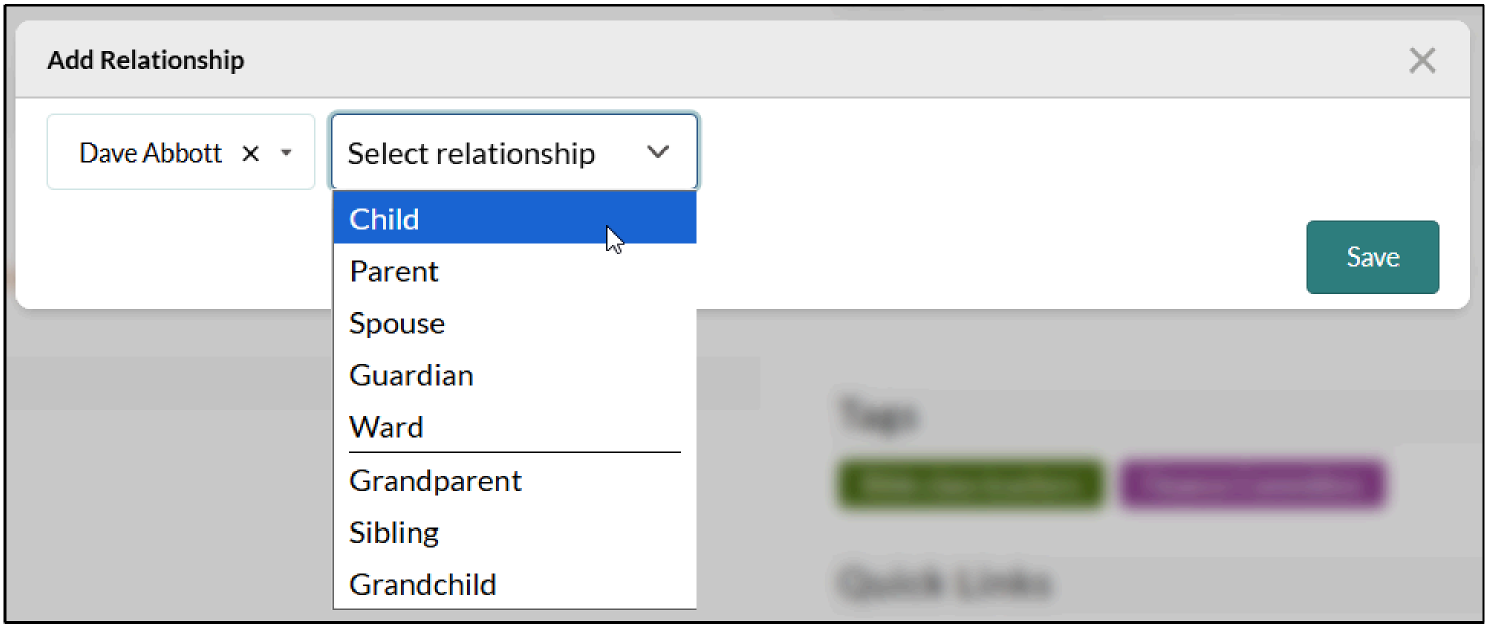
3. Click Add Relationship to start a new relationship entry.



4. Use the "Select person" drop-down to select the name of the person you wish to link as a family member.

5. Use the "Select relationship" drop-down to select the appropriate relationship option.

6. Click Save to save the relationship to the profile. This relationship will now appear on both records.



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

To remove a relationship,

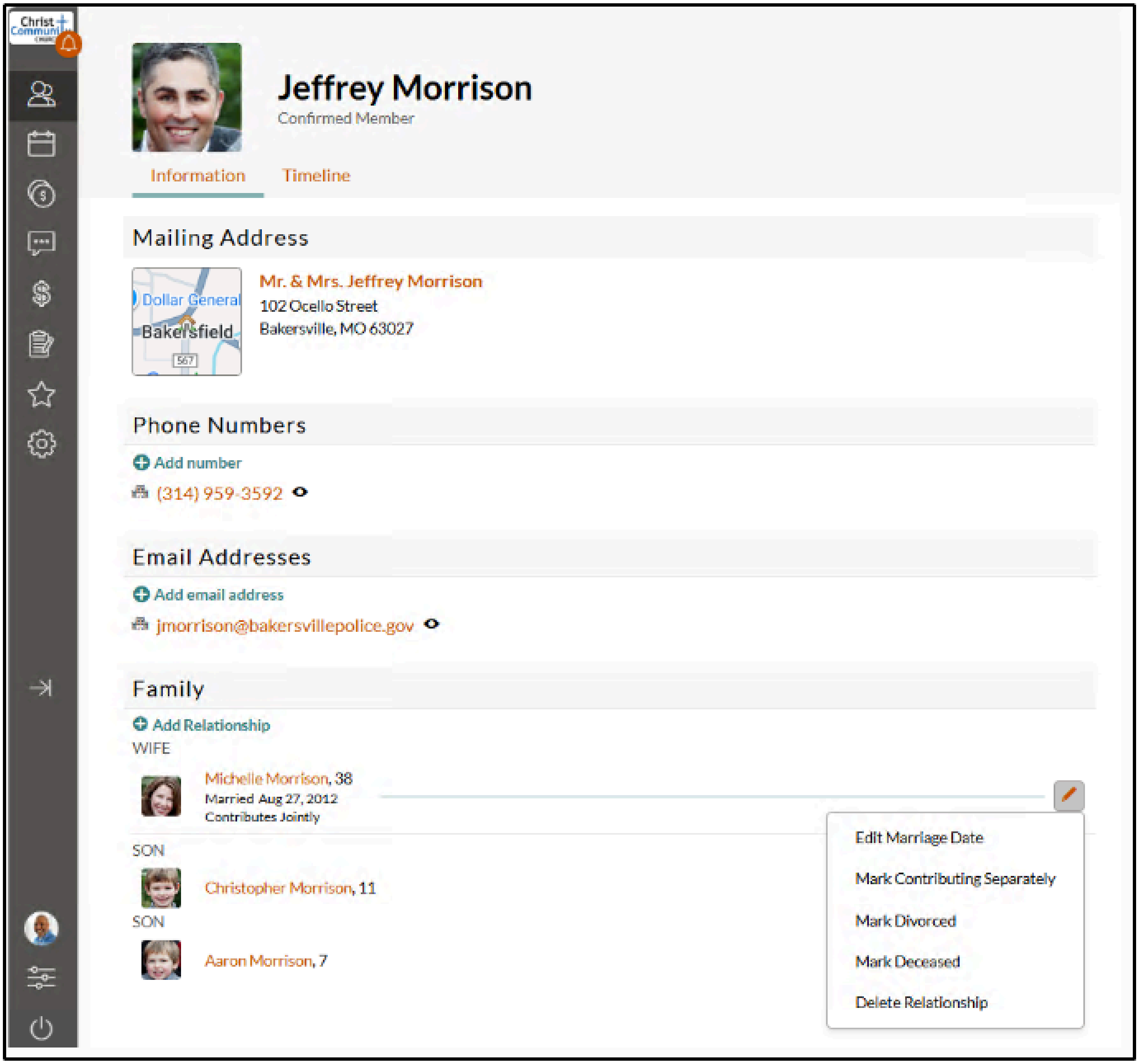
1. Hover over the relationship in the Family section and click the Pencil icon to the right.

2. Depending on the nature of the relationship, there may be multiple options. Click "Delete Relationship" to remove the relationship entirely.

A marriage relationship has extra aspects that you may need to edit, such as the wedding date, whether or not the couple gives jointly (for tax purposes), and/or if the couple divorces.

To edit a relationship,

1. Hover your mouse over the relationship in question until you see the Edit pencil and click on it.
2. You will see several options.
    - You can click Edit Marriage Date to enter the couple's wedding date.
    - To change their giving status, for tax purposes, if they are giving jointly, you'll see the option to Mark Contributing Separately, and if they are currently marked that way, you'll see an option to Mark Contributing Jointly.
        - Note: If an envelope number was involved in either case, you'll want to make note if it before changing the couple's giving status, and determine where existing offerings should be attributed after the change, and who gets what number.
    - Mark Divorced
        - The note on envelope numbers applies here as well.
    - Mark Deceased indicates that the person indicated in the relationship has passed away. This will change their status to deceased.
        - Take a look ahead of time at envelope numbers and giving designations for this change as well.

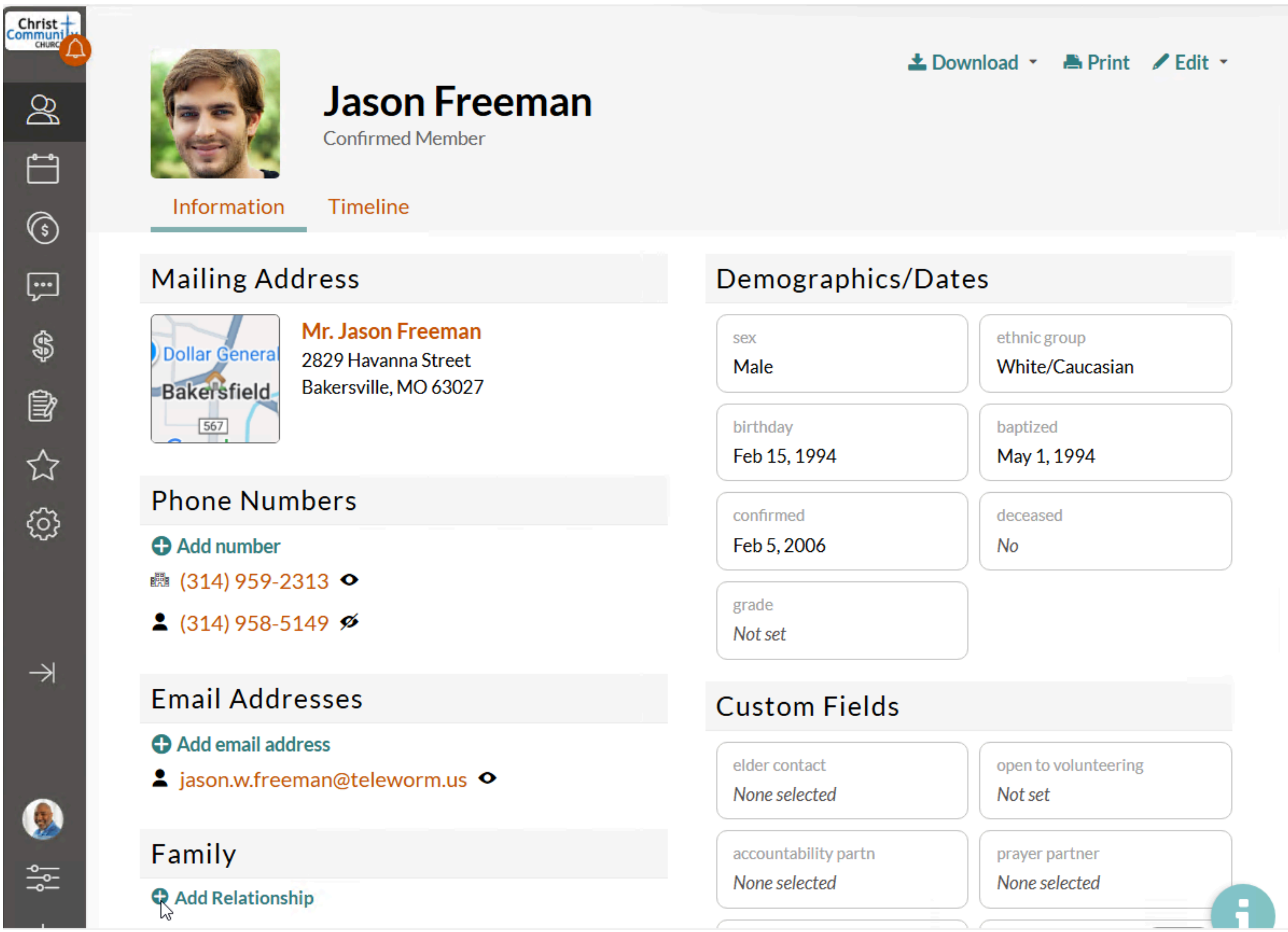

Jeffrey Morrison
Confirmed Member
Information
Timeline
Mailing Address
Dollar General
Bakersfield
Mr. & Mrs. Jeffrey Morrison
102 Ocello Street
Bakersville, MO 63027
Phone Numbers
Add number
(314) 959-3592
Email Addresses
Add email address
jmorrison@bakersvillepolice.gov
Family
Add Relationship
WIFE
Michelle Morrison, 38
Married Aug 27, 2012
Contributes Jointly
SON
Christopher Morrison, 11
SON
Aaron Morrison, 7
Edit Marriage Date
Mark Contributing Separately
Mark Divorced
Mark Deceased
Delete Relationship

Adding a Marriage [New Profile View]

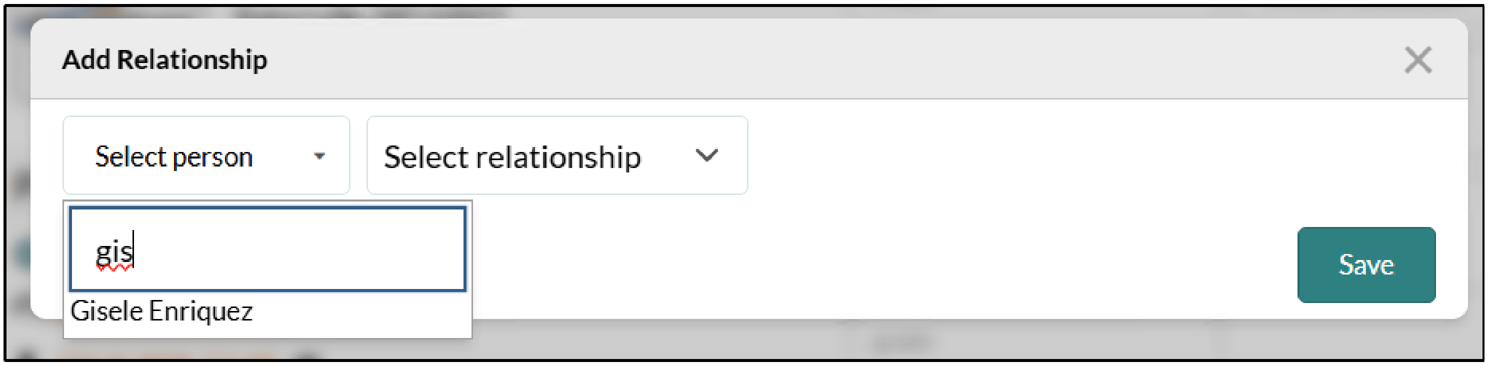
When two people get married, you'll want to establish that relationship on your site and edit their giving unit status.

To enter a marital relationship,

1. Find and open the profile for one half of the couple.



2. Use the Select Person drop-down to find and select the name of the spouse. You can type to filter this field to find the name quickly.

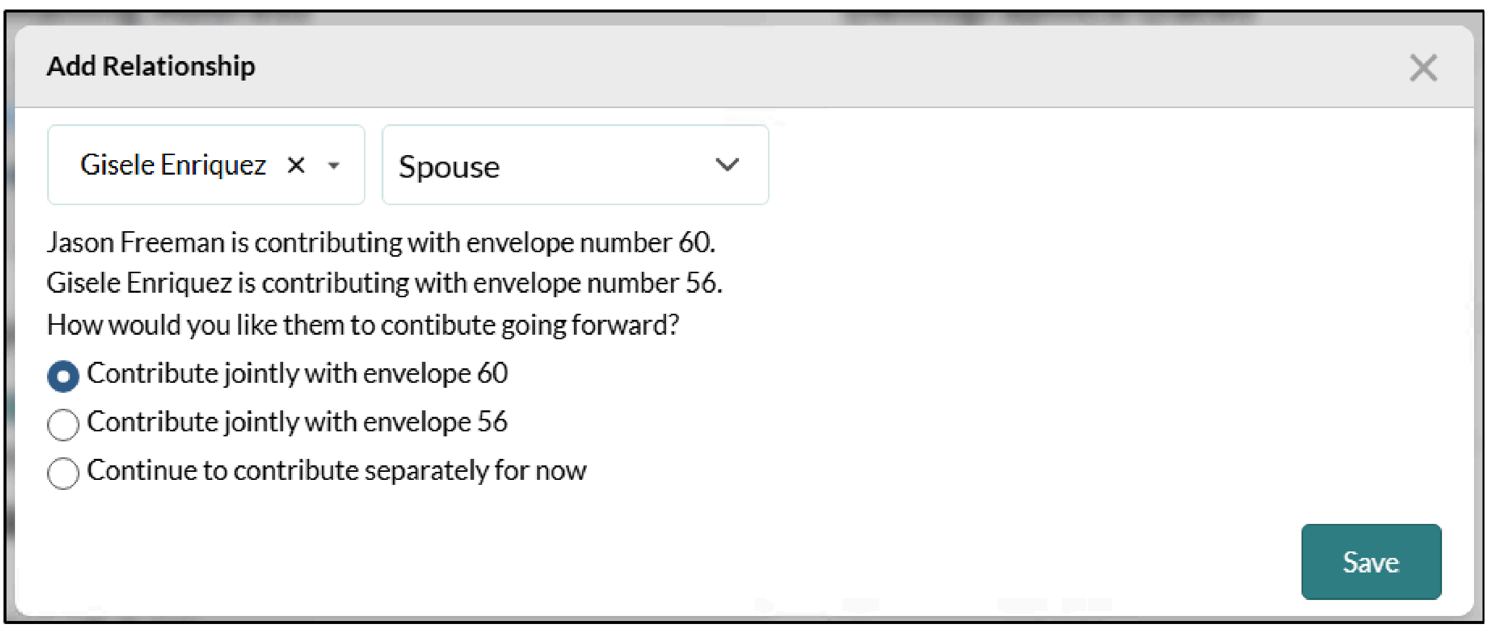


3. Use the "drop-down menu to select the Spouse option.

4. You will see some options related to giving. If both individuals already have an envelope number, you will be able to select whether they will give jointly with one of those two numbers or whether they will continue to give separately for the time being.

Note: All offerings given by a single person before the relationship was changed will still be attributed only to that single person, so when recording a mid-year marriage, you may choose to set them to continue giving separately for the time being, and then change their giving status in the new year so they can have separate contribution statements for the full current year, and begin contributing jointly for their first full year married.

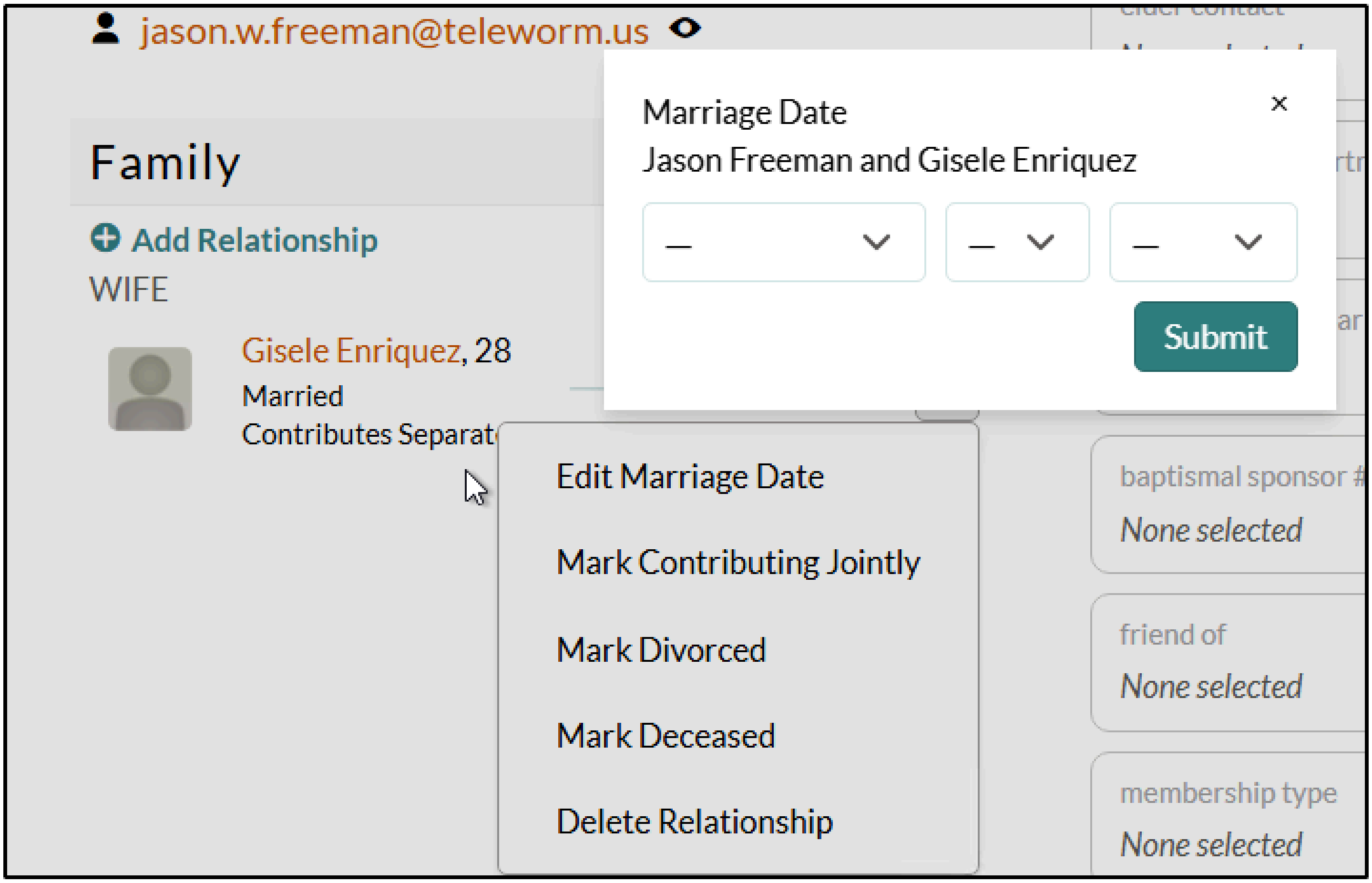
If you have concerns, please reach out to CTS Support.



5. Click "Save" to add the new relationship.

6. The new spouse will now be listed under Family.

7. To add the wedding date, hover your mouse over the relationship and click the Pencil icon, then select Edit Marriage Date. A box will pop up to allow you to select the month, day, and year.



Recording a Divorce [New Profile View]

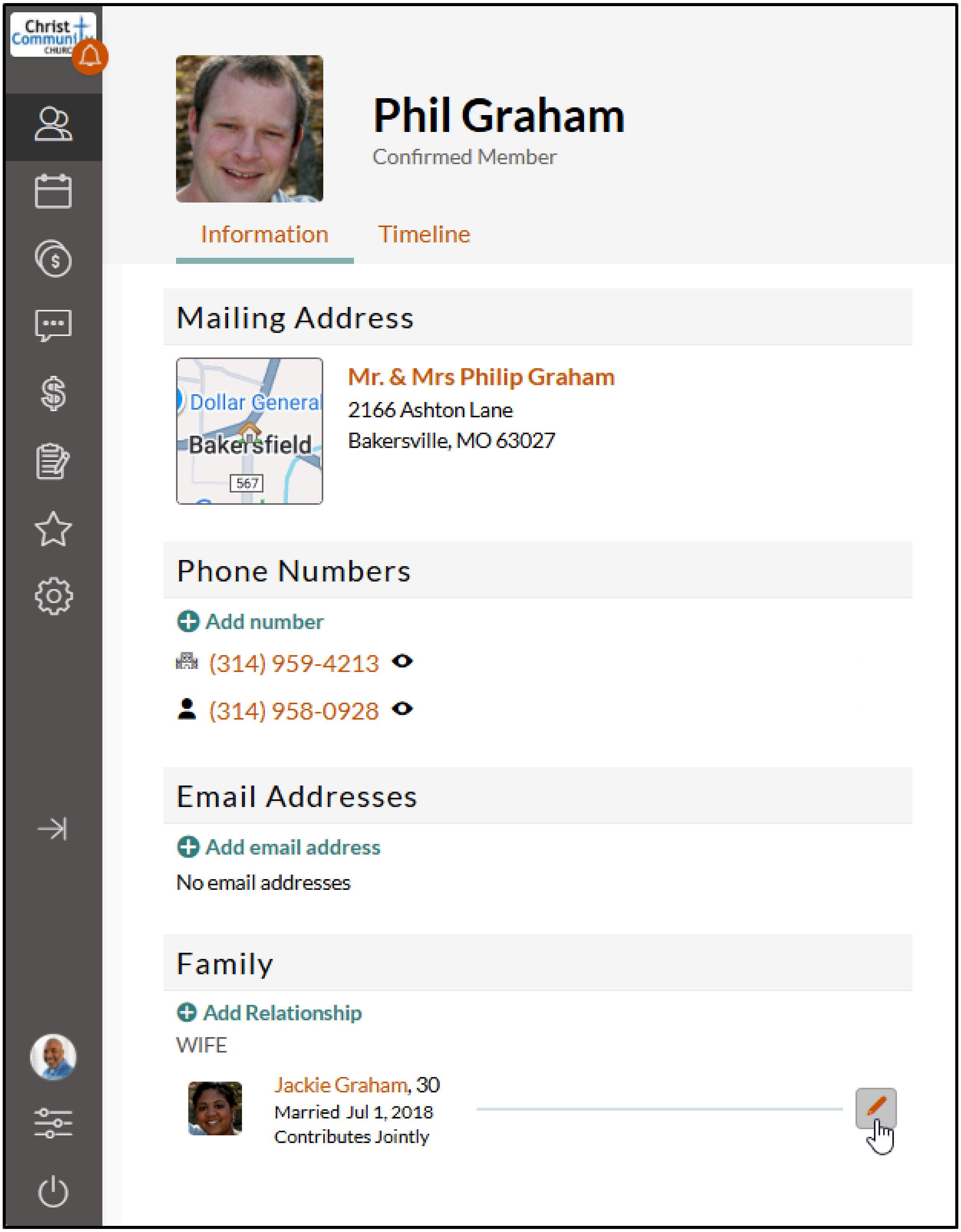
If two of your members get divorced, you'll need to enter their relationship change.

Before adding a divorce, take note of the couple's envelope number. This number will disappear when the divorce is recorded, so you may need to add it again to the spouse who will retain the number.

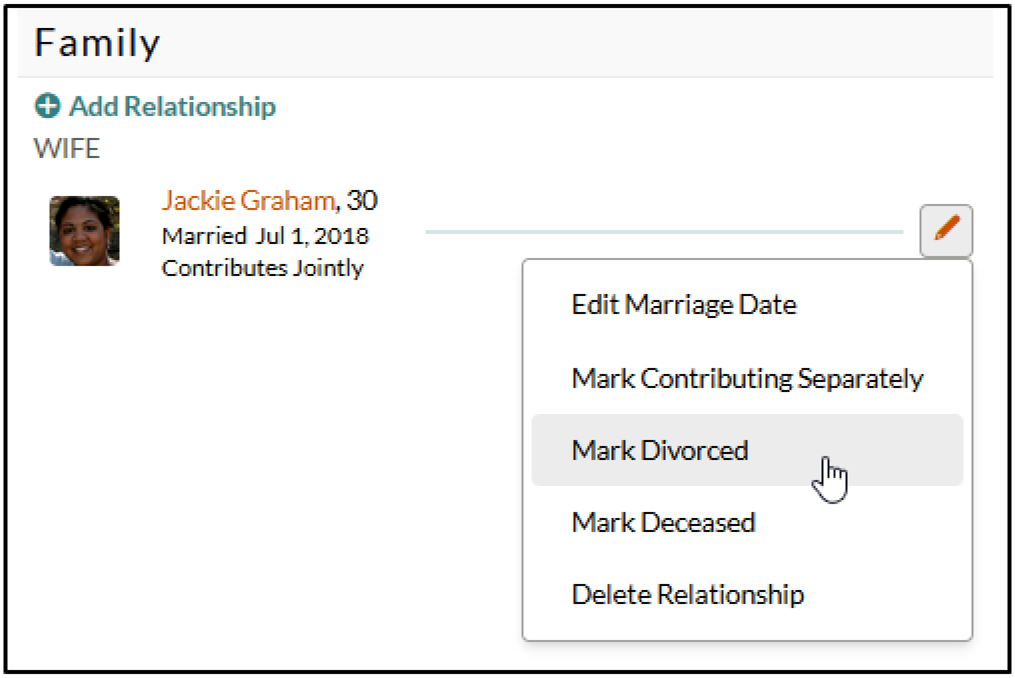
To edit a marriage,

1. Find and open the person record for a member of the couple.

2. In the Family section on the left-hand side of the profile, below the area for email addresses, hover over the relationship and click the edit pencil that appears.



3. From the list of options, select "Mark Divorced".



4. This will immediately record the divorce on both people's profiles - a relationship will no longer show, but you will see a "Previous Spouses" link you can click to show their former relationship. Any envelope that was assigned to the couple will also be removed from both persons, as they will be giving separately from now on.

6. Reassign separate envelopes to each person if needed.

Note: All offerings given by the couple, before this relationship was edited, will still be attributed to both givers, and all offerings given by a single person after the relationship is changed will be attributed only to that single person. Updating marriage information may result in a couple receiving contribution statements both for themselves and for their joint giving.

If you have concerns over couples receiving multiple contribution statements, please reach out to CTS to move offerings however you need.

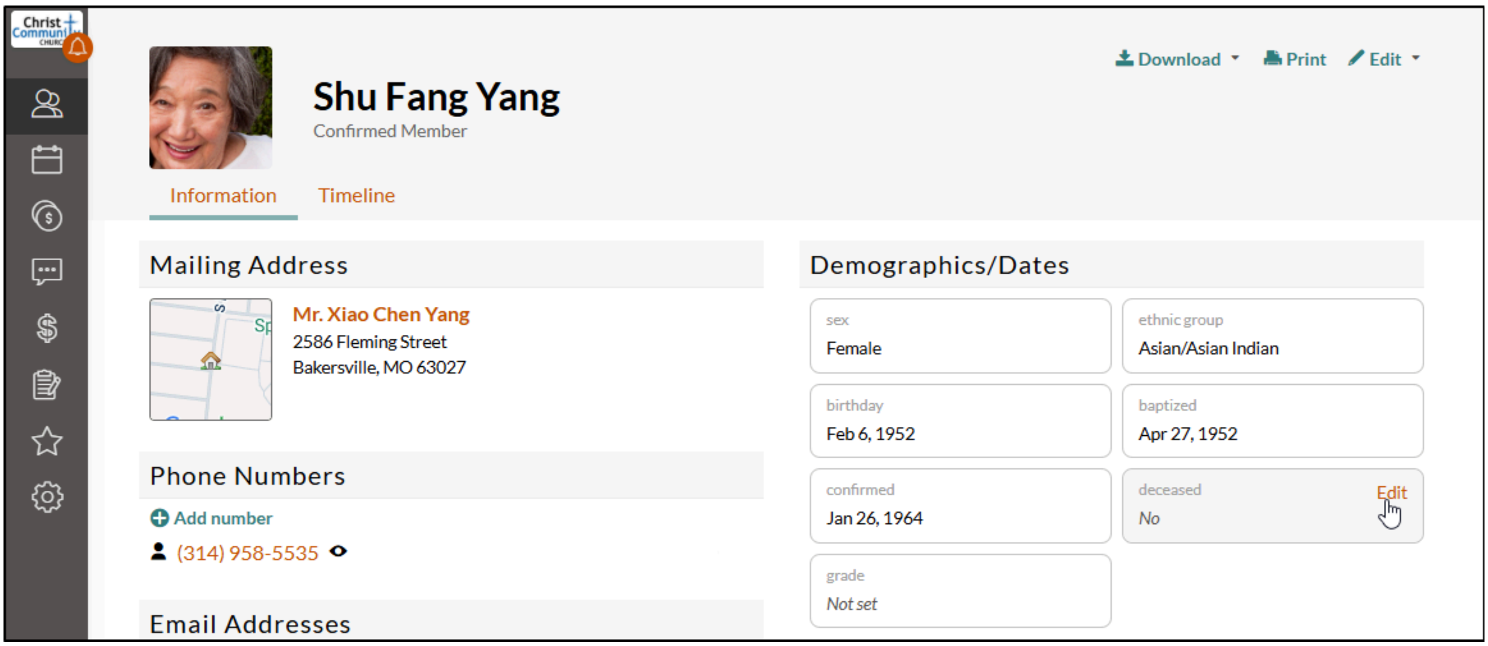
Recording a Death [New Profile View]

When a person dies, you can add their death either from their own profile or from a family member's profile.

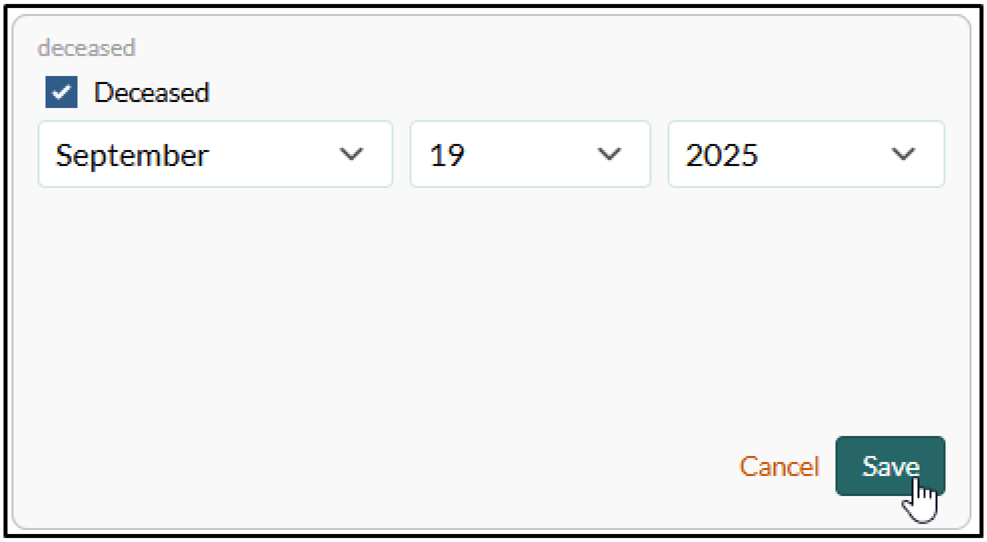
To mark someone as deceased on their own profile

1. From the People's view, click on the individual's name to open their profile.

2. In the Demographics/Dates section on the right-hand side of the Information tab, hover your mouse over the "Deceased" box to show the Edit option.



3. Click Edit, and then check the Deceased box. If you know the date the person passed, use the drop-down boxes to record the date and click Save.



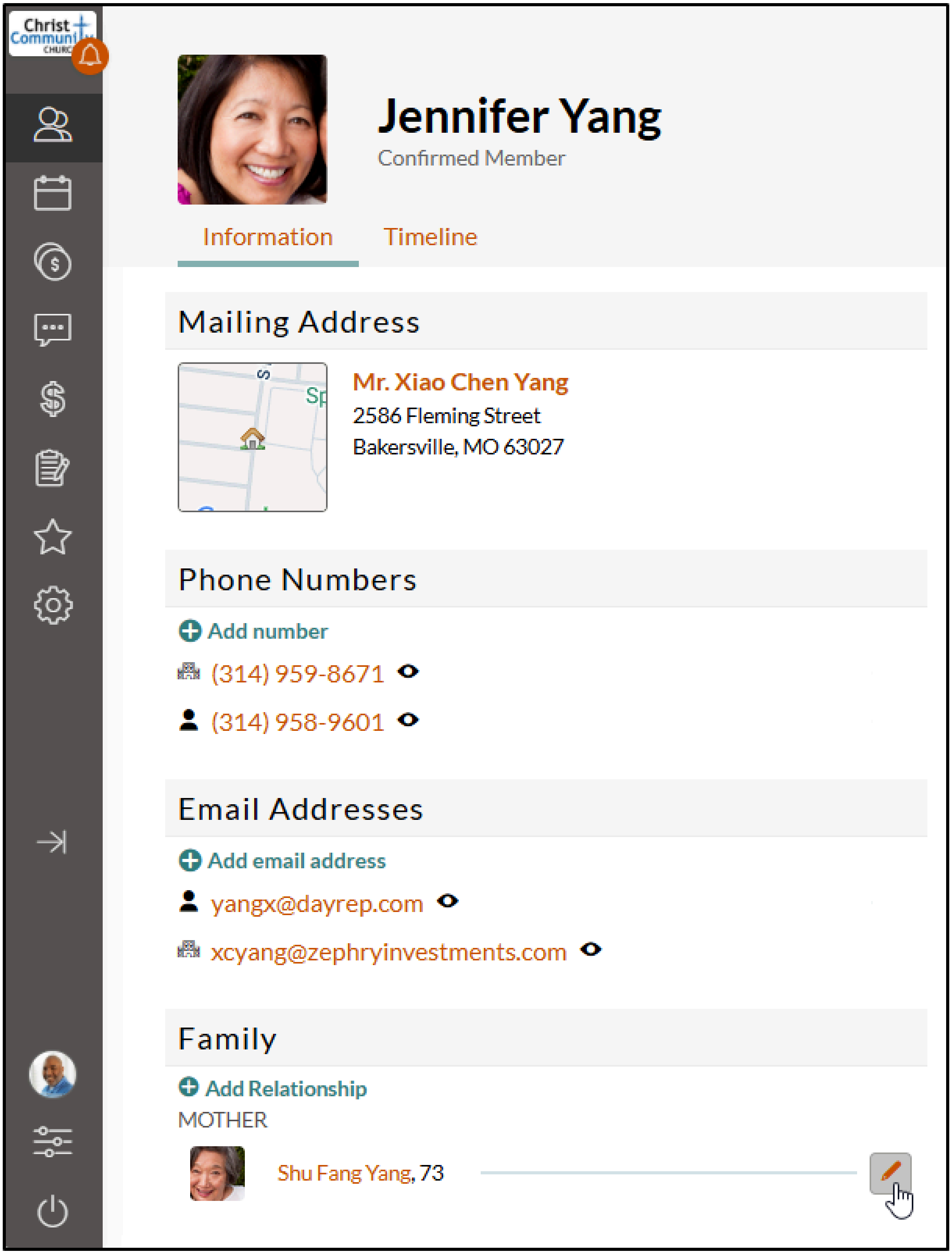
4. Click Save. They will be marked as a deceased member.

If a death has been entered in error, edit the "deceased" field again and uncheck the box marking them as Deceased.

To mark someone as deceased from a family member's profile

1. Find and open the profile for the surviving spouse, child, or other relation that is recorded as Family in the profile.

2. Hover over the relationship showing the edit pencil.



3. Click the edit pencil and select "Mark Deceased".

4. If you know the date of the passing, click the pencil a second time and select "Edit Death Date", and use the drop-down boxes to record the date.

Notes regarding envelopes and giving:

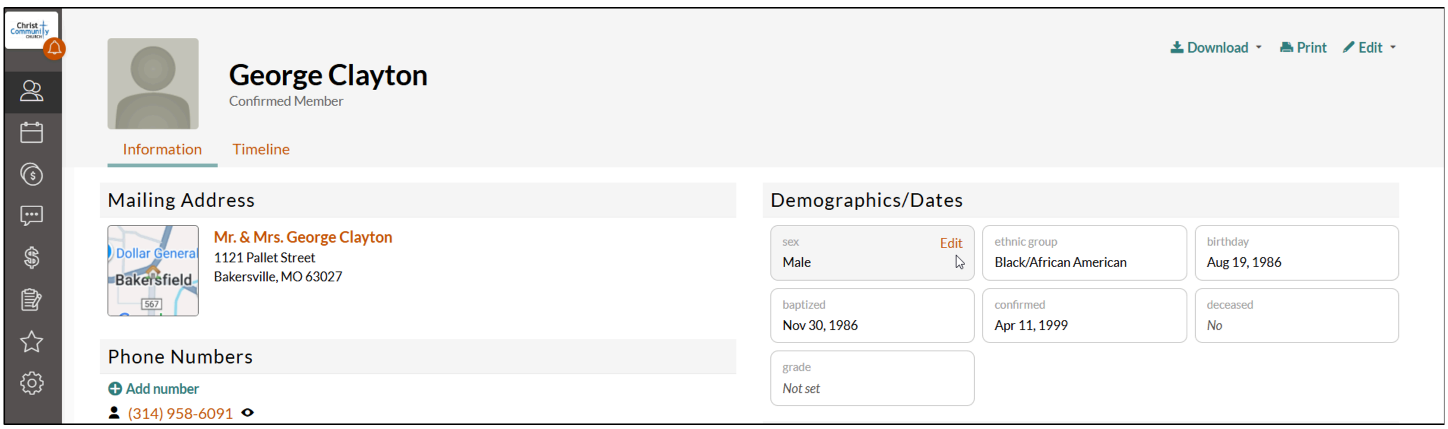
1. If you are doing this from a spousal relationship and the couple was giving jointly, this will remove the envelope number from the deceased person, leaving it assigned to the surviving spouse.
2. All offerings given by the couple before this change will still be attributed to both, and all offerings given by the surviving spouse after the relationship was edited, will be attributed only to surviving spouse. Updating marriage or death information may result in a couple receiving separate contribution statements one for themselves and one for their joint giving.

If you have any questions please reach out to CTS Support.

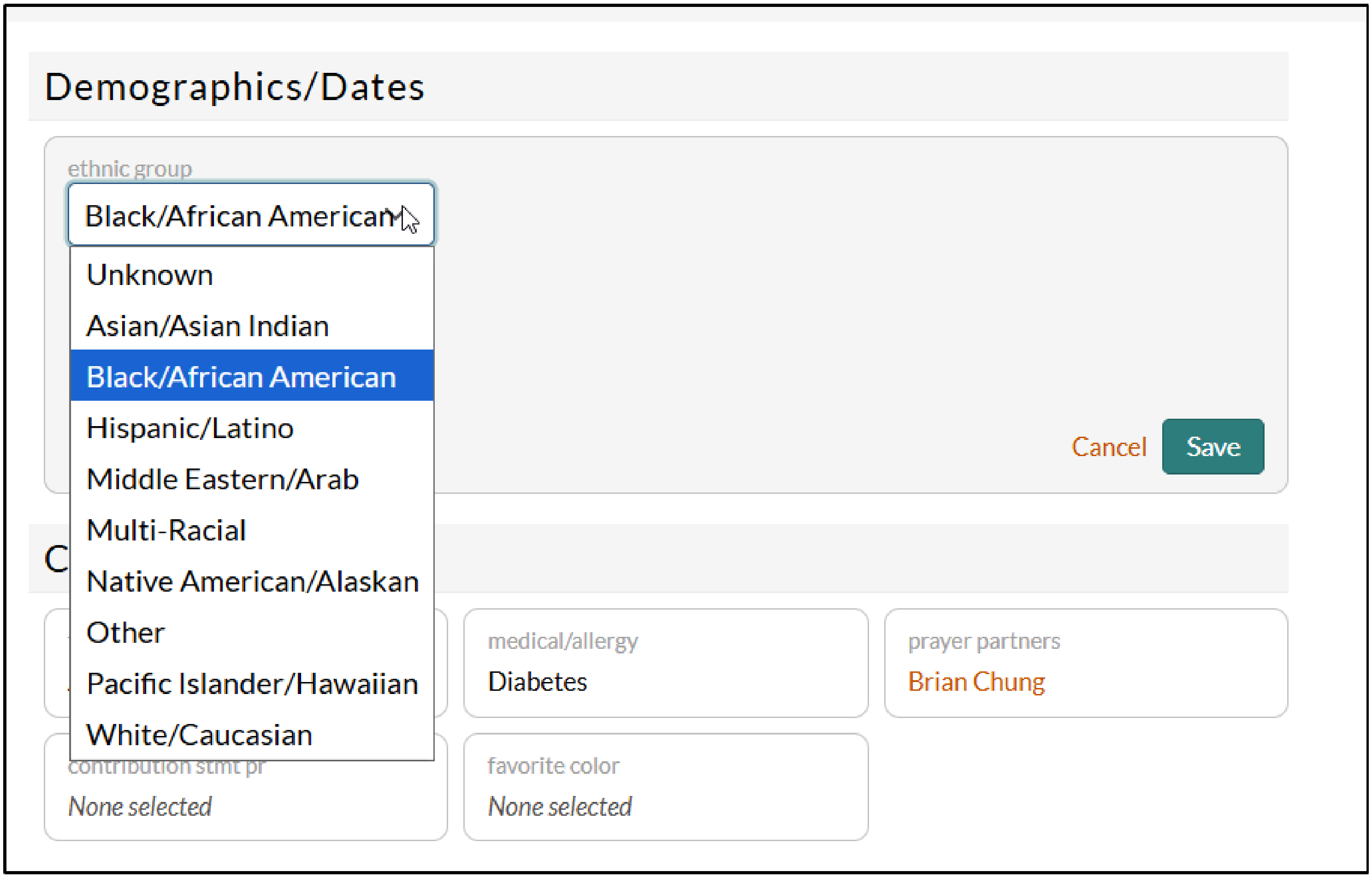
Updating Personal Demographic Information [New Profile View]

In a person's profile, users can update personal information for that individual, such as sex, ethnicity, and birthday.

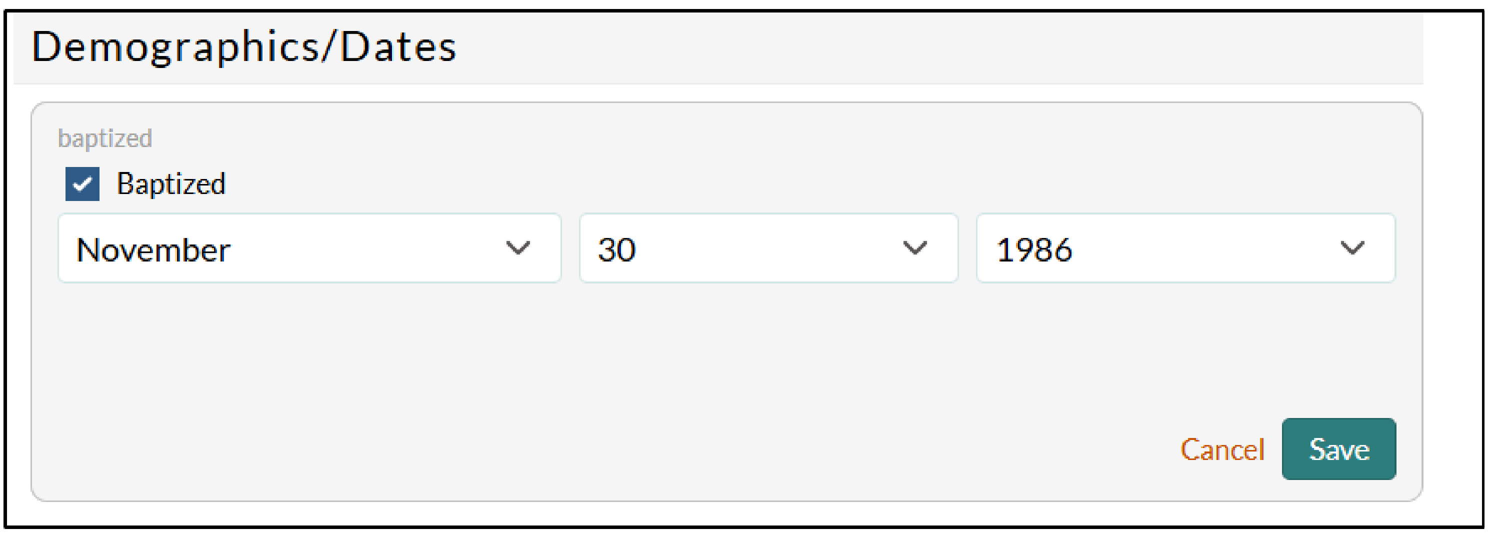
1. From the People's view, click on the individual's name to open their profile.
2. Personal demographic information is located on the right side of the Information tab, just below the Name Banner.
3. Hover your mouse over the field you wish to update, and an Edit link will appear.



4. Click the link to edit that piece of information.
   - For selection fields, like sex, ethnic group, and grade, use the drop-down menus to choose from the available options.



- For date fields like birthday, baptism date, confirmation date, or death date, partial dates are accepted. If the date is not known for baptism, confirmation, or death, users can simply check the box to mark them as such.



- Custom fields will be restricted according to their field type and options entered when created.

Note: Marking a current member as baptized and/or confirmed will update their membership designation as either a baptized member (if only baptized) or a confirmed member (if confirmed). See this article for a list and descriptions of membership status options.

Assigning a Grade to an Individual [New Profile View]

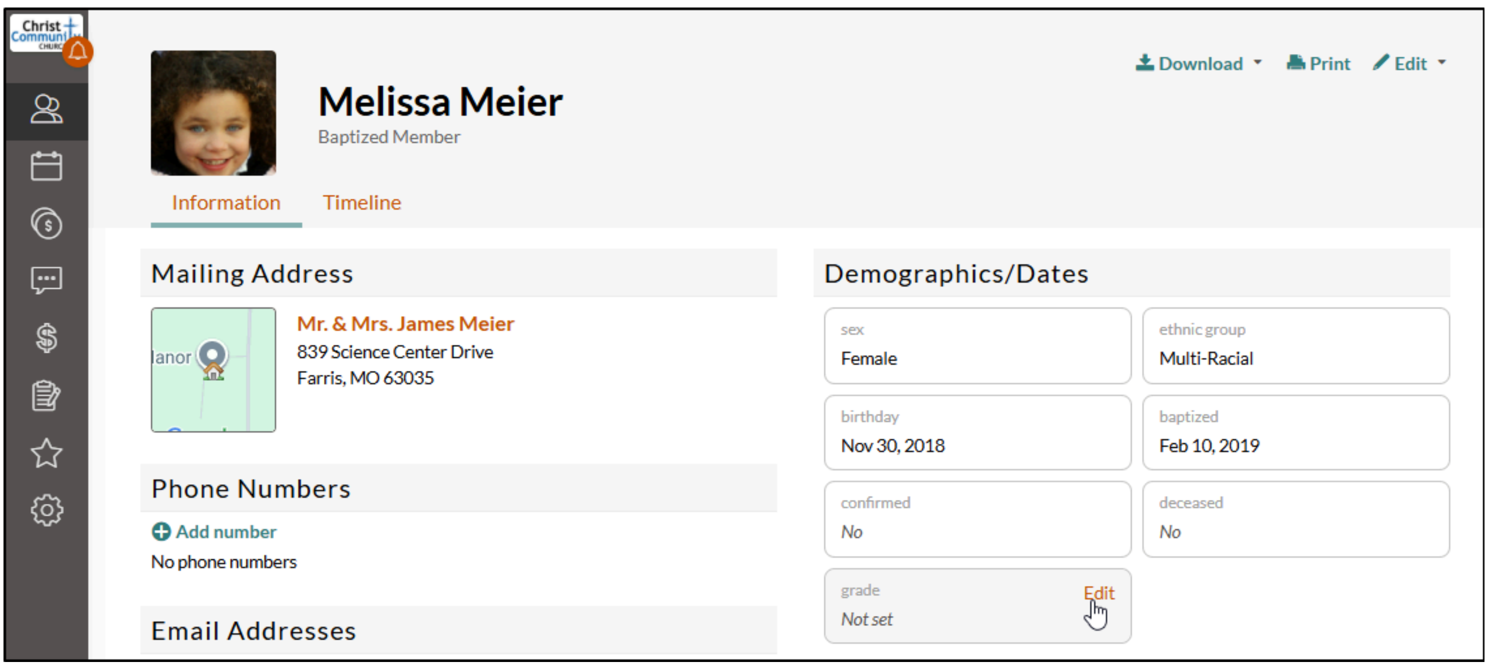
If you have set up all grades as desired in the Settings>People>Grades view, Those grades can now be assigned to individual records.

This can help keep track of either a student's school or Sunday School grade, depending on your church's preference.

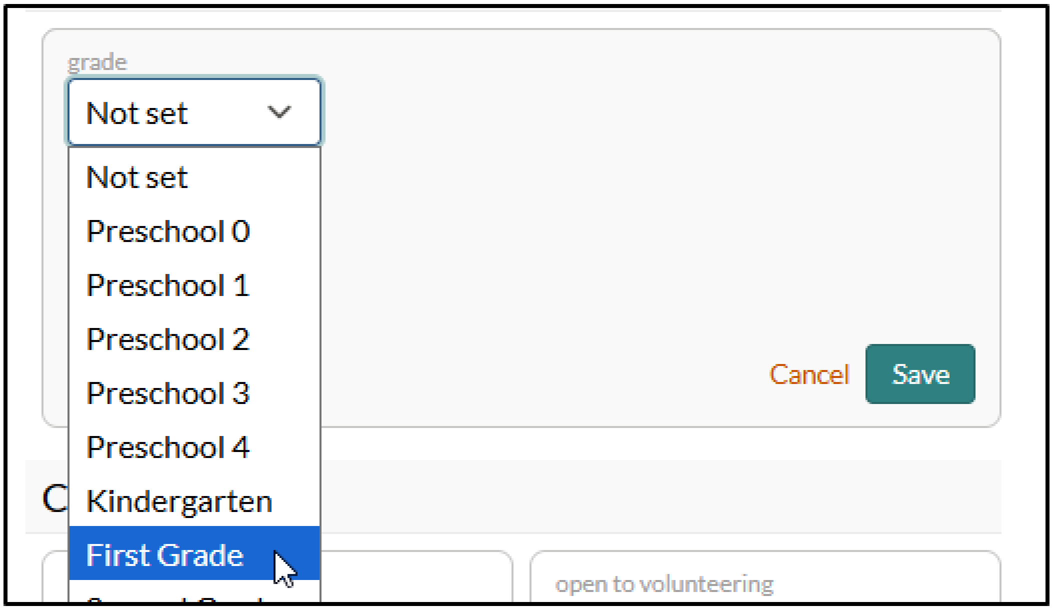
1. From the People view, click on the individual’s name to open their profile.

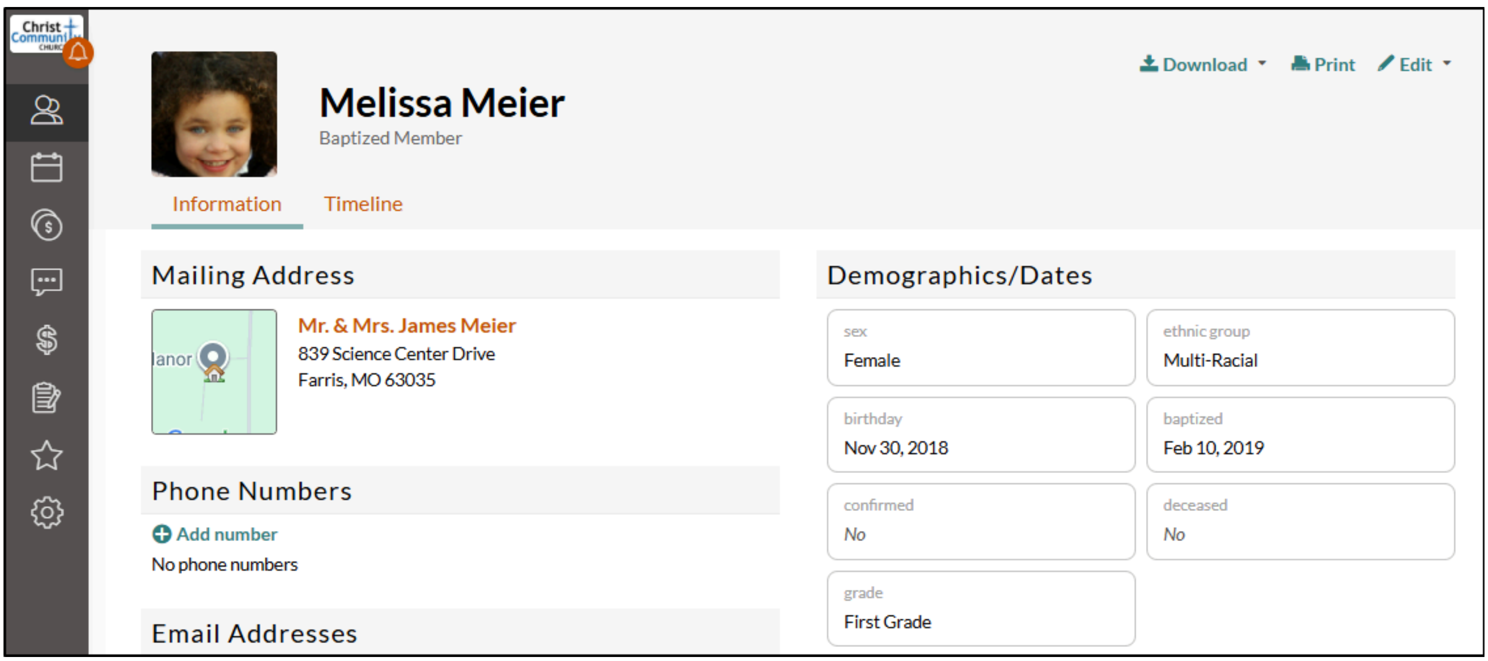
2. Personal information like grade is located on the right side of the Information tab under Demographics/Dates.

3. Hover your mouse over the Grade box until the edit link appears.



4. Click Edit and use the drop-list to select the child's grade, then click Save.





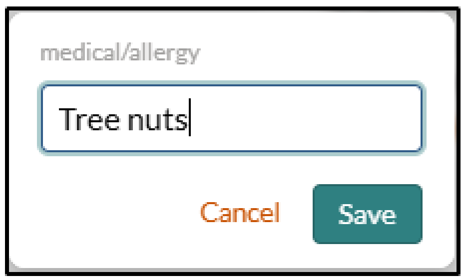
If you are interested in setting up automatic promotion for grades at a specific date each year, please visit our article here.

Updating Custom Fields [New Profile View]

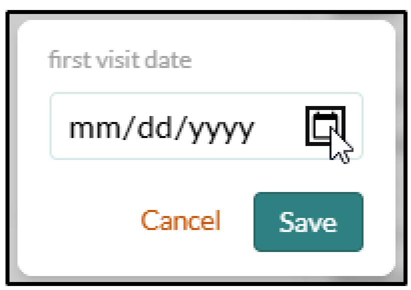
When Church360° users create their own Custom Fields to record data for an individual, these fields will be found in their own section on the right-hand side of the Information tab in an individual's profile view. To edit one of these fields, hover your mouse over the field you wish to update, and an Edit link will appear.

Several types of Custom Fields can be created in Church360°, and each are edited in their own way once you click Edit. The name of the field will show at the top of the box that opens.

For a Text field, type the desired information into the text box, and click Save.

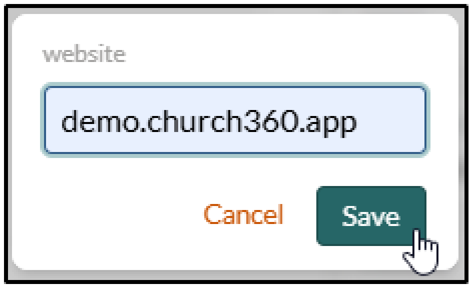


For a Date field, click the calendar icon, select the date, and click Save.

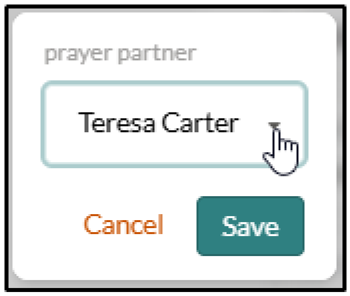


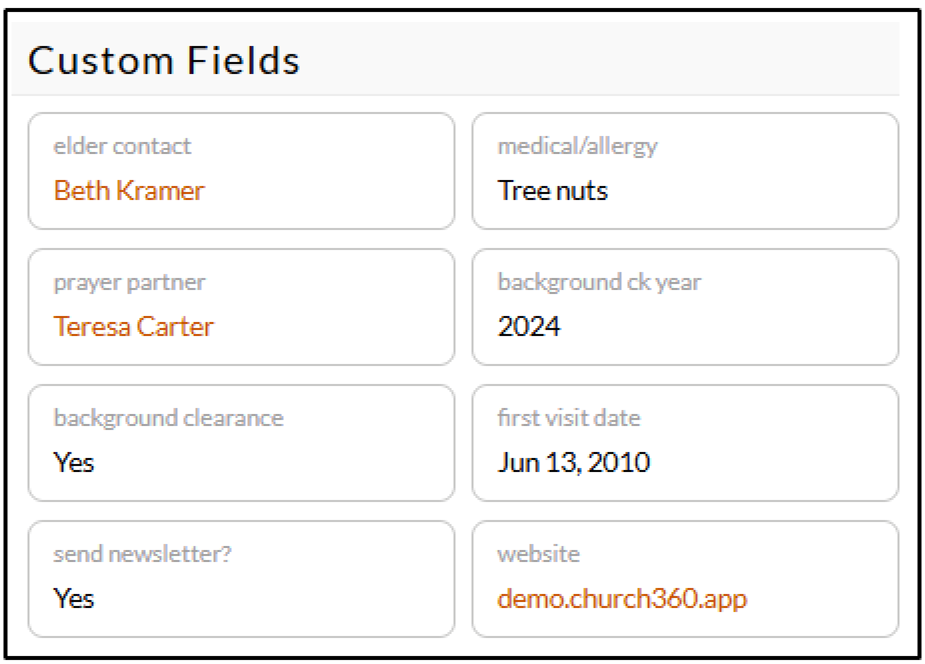
For a List field, click the drop-down, select the desired response from the options listed, and click Save.

For a Link field, type or paste the web address into the dialog box and click Save.



For a Person Link field, click the drop-down, select the name of another person in your Church360° database, and click Save.





Adding or Removing Tags within a Profile [New Profile View]

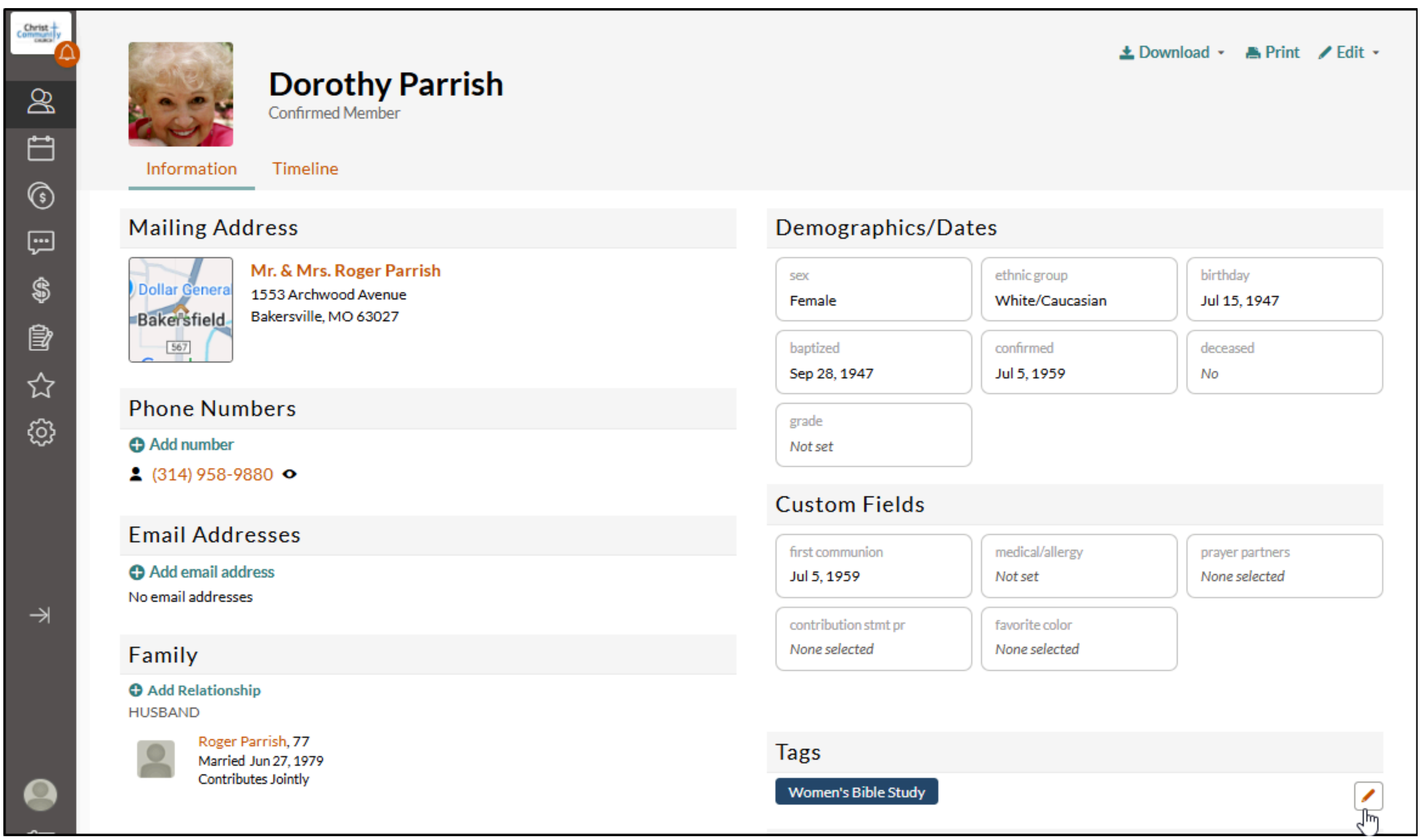
When you are editing only one person's information, adding Tags from that person's profile is more convenient than using the Mass Add/Remove Tags feature.

To add (or remove) a tag when on a person's profile,

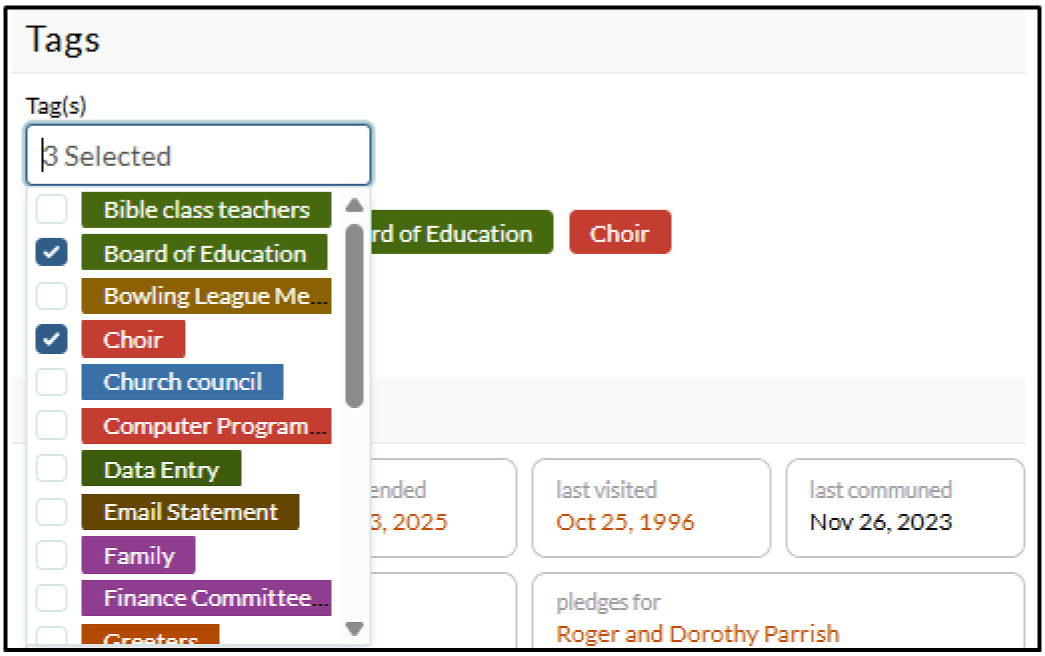
1. From the People view, click on the individual's name to open their profile.

2. The Tags section is located on the right-hand side of the Information tab in the profile view, below Custom Fields.

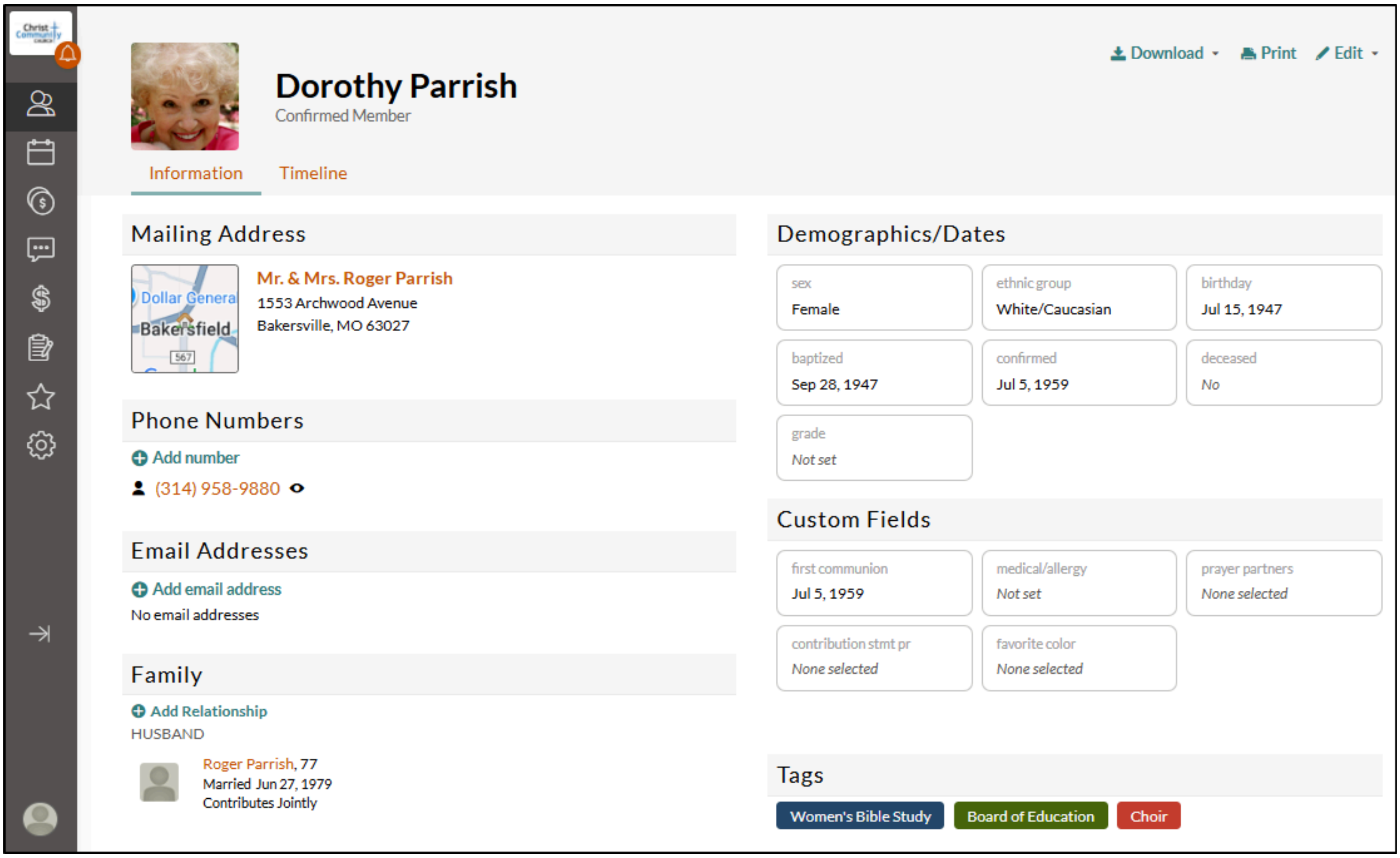
3. To add a new tag, hover your mouse in the space below the Tags header until the edit pencil appears and click it.



4. Click in the box that appears below "Tag(s)" to expand the drop-down, then use the checkboxes to add or remove tags as needed.



5. Click outside of the box to close the drop-down, then click Save to apply the changes.


Dorothy Parrish
Confirmed Member
Download
Print
Edit
Information
Timeline
Mailing Address
Mr. & Mrs. Roger Parrish
1553 Archwood Avenue
Bakersville, MO 63027
Phone Numbers
Add number
(314) 958-9880
Email Addresses
Add email address
No email addresses
Family
Add Relationship
HUSBAND
Roger Parrish, 77
Married Jun 27, 1979
Contributes Jointly
Demographics/Dates
sex
Female
ethnic group
White/Caucasian
birthday
Jul 15, 1947
baptized
Sep 28, 1947
confirmed
Jul 5, 1959
deceased
No
grade
Not set
Custom Fields
first communion
Jul 5, 1959
medical/allergy
Not set
prayer partners
None selected
contribution stmt pr
None selected
favorite color
None selected
Tags
Women's Bible Study
Board of Education
Choir

Viewing an Envelope Number from an Individual's Profile [New Profile View]

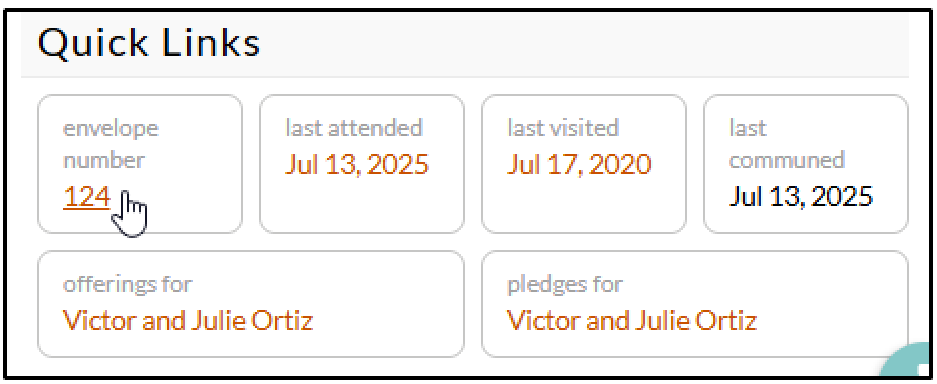
A person’s profile displays their Envelope Number (if they have one), and includes a link to where the number can be edited.

To view a person's envelope number,

1. Go to the People view and click on the individual's name to open the profile.

2. The Quick Links section of a person's profile is on the lower-right of the Information tab, below Tags. You will likely have to scroll down the page to see this section.

3. The "envelope number" box will be the first one under Quick Links. Here you can see the person's current envelope number, if they have one.



4. If you wish to add, update or remove the number, click here to be taken to the Envelopes view in Settings.

5. For more information on adding, changing or removing an envelope, see:

- Adding and Editing Envelope Numbers
- Removing Envelope Numbers

Viewing an Individual's Attendance [New Profile View]

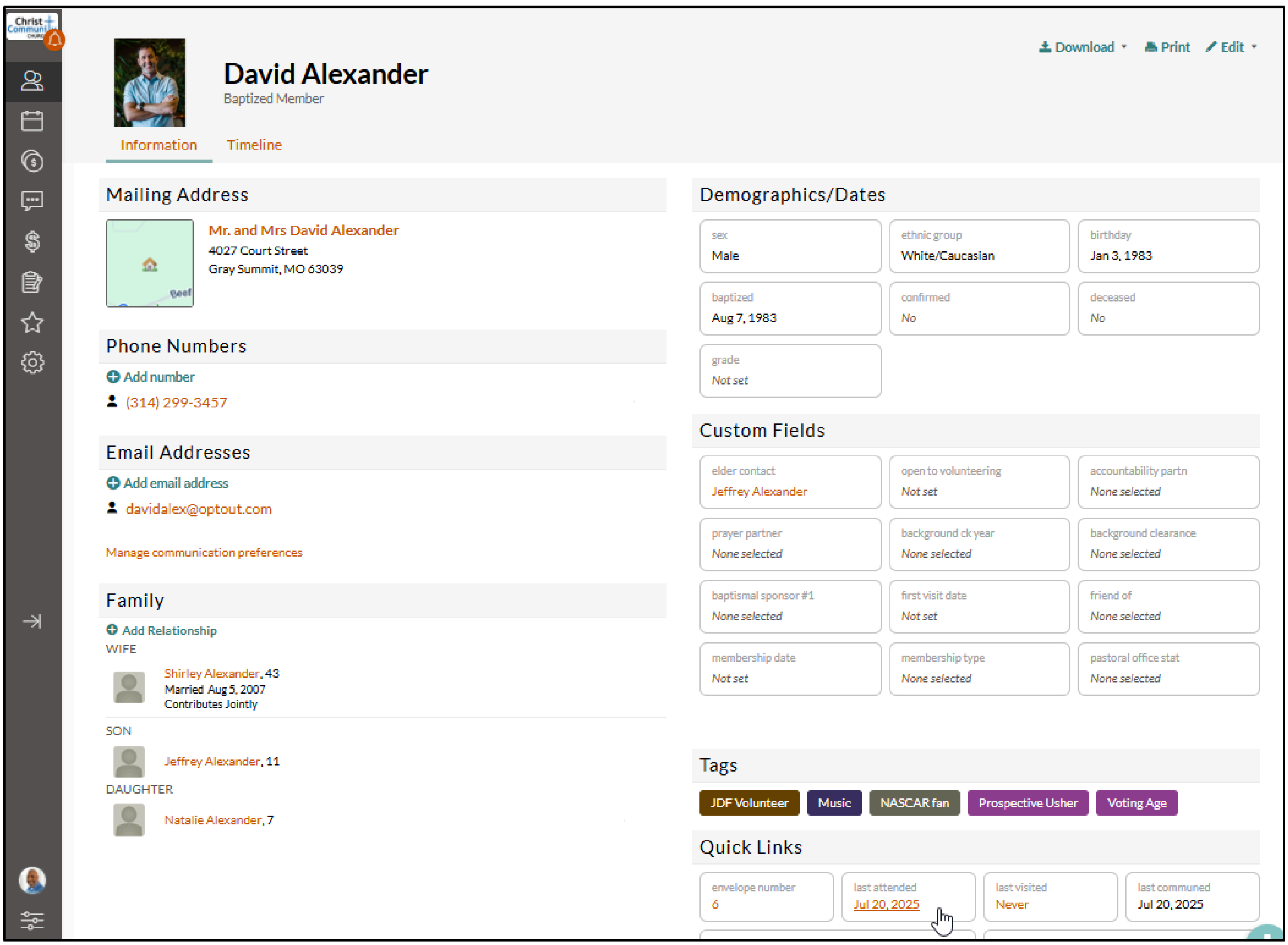
A person's profile contains a link to view their attendance history, which users can use to reference events they have attended.

To view a person's attendance history from their profile,

1. Go to the People view and click on the individual's name to open the profile.

2. The Quick Links section of a person's profile is on the lower-right of the Information tab, below Tags.

3. Click on the "Last attended" box.

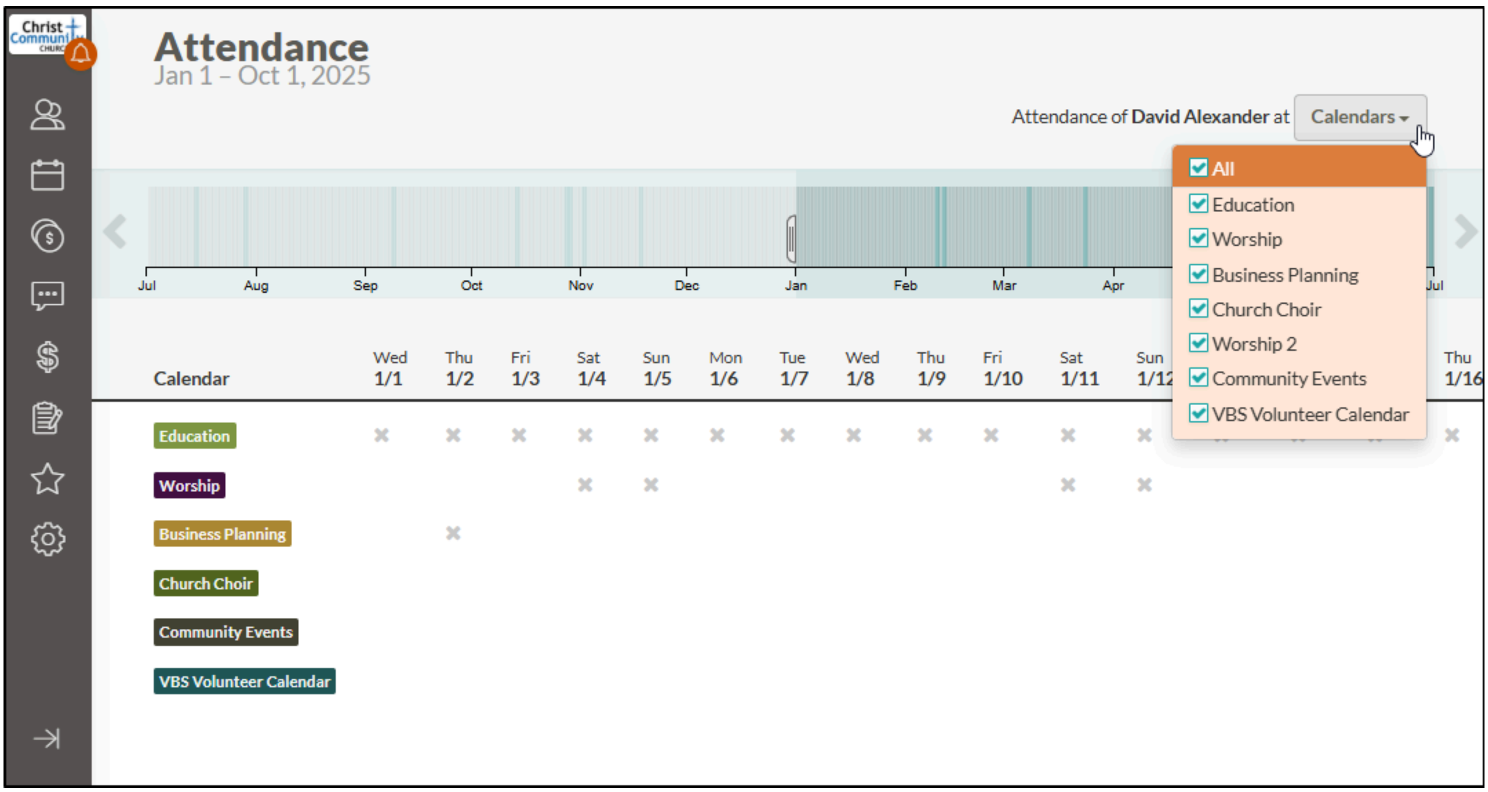


4. This will take you to the Attendance view, filtered for only the attendance of the individual (note the name showing in the upper-right "Attendance of...").

5. Use the date-range selector to specify the date range you wish to see. You can do this by dragging the handles on either side of the selector to choose the start and end dates.

6. To filter your attendance results by Calendar type, use the drop-down menu on the top right portion of the page.

7. 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 Pastoral Visits from a Profile's Quick Links [New Profile View]

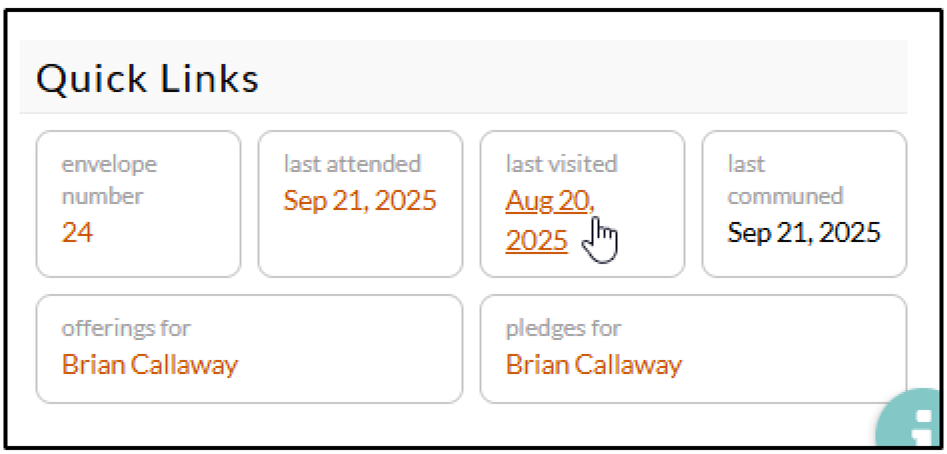
A person's profile contains a link to view Pastoral Visits made to them.

1. Go to the People view and click on the individual's name to open the profile.

2. The Quick Links section of a person's profile is on the lower-right of the Information tab, below Tags.

3. The "Last visited" box shows the last date that a Pastoral Visit was recorded for this person.

4. Click to see a list of the visits in the Pastoral Visits view.



Viewing an Individual's Offerings [New Profile View]

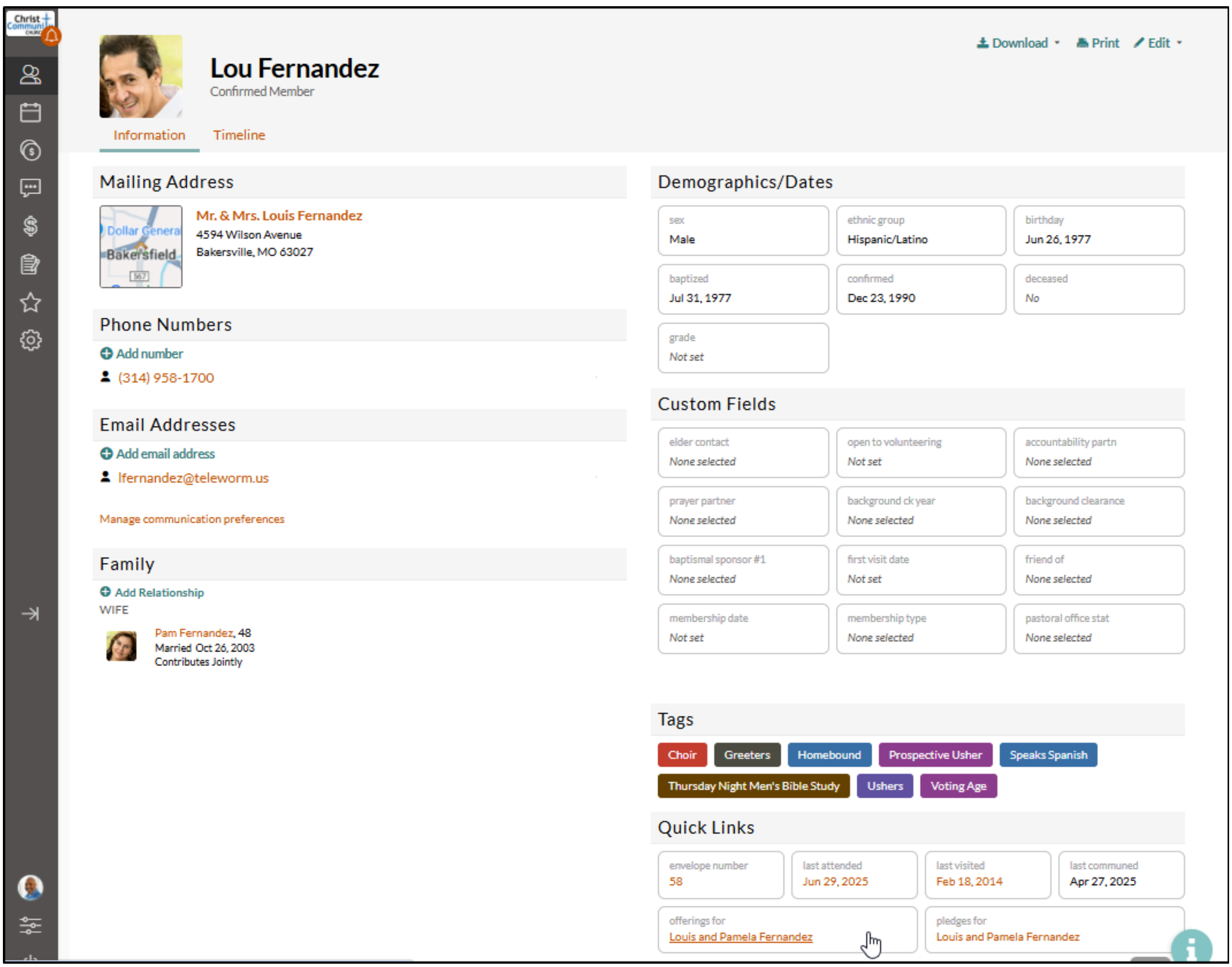
A person's profile contains a link to view offering history that users can use to reference what a person has given to the church.

To view a person's offering history from their individual record,

1. Go to the People view and click on the individual's name to open the profile.

2. The Quick Links section of a person's profile is on the lower-right of the Information tab, below Tags. You will likely have to scroll down the page to see this section.

3. Click on the "Offerings for" box, as seen below.

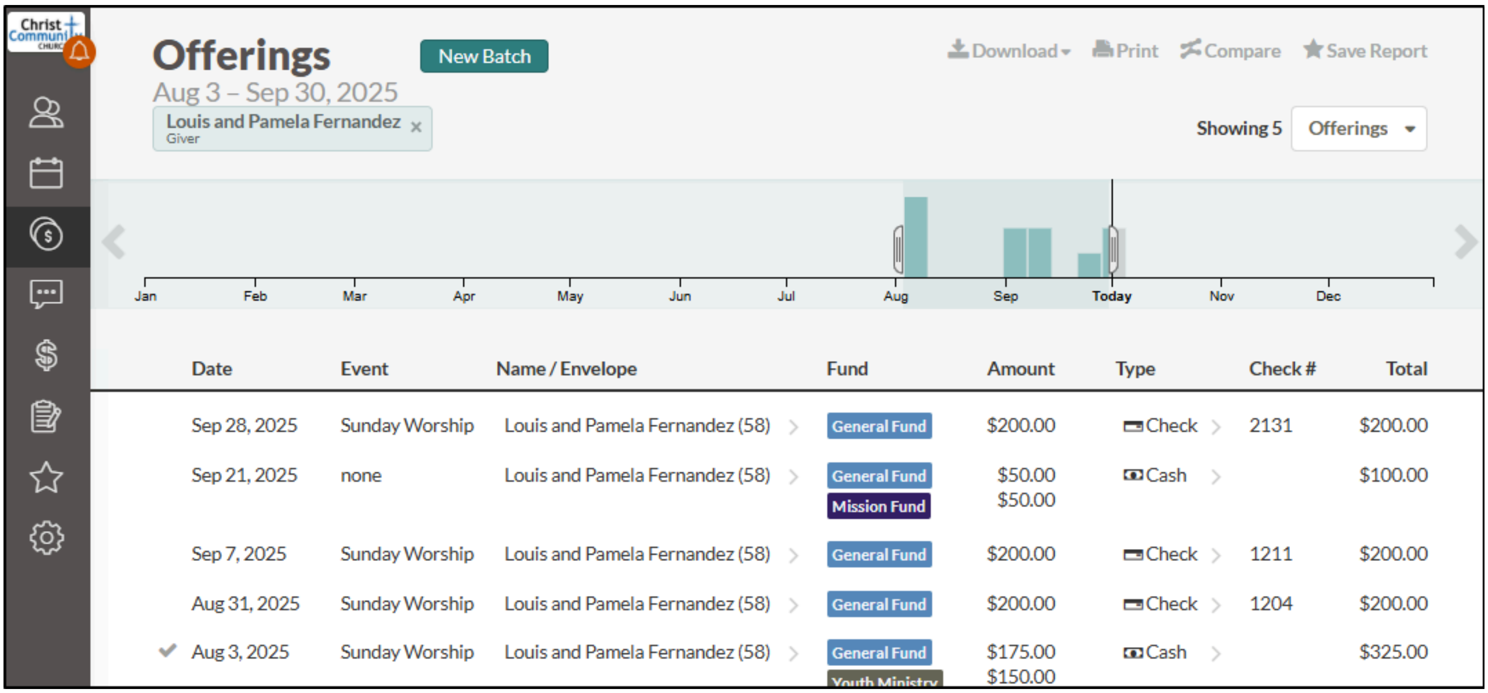


4. This will take you to the Offerings view, filtered only for offerings given by the individual in question, or, if that individual gives jointly with a spouse, for the two of them together (note the name(s) will be showing selected below the date in the upper-left).

5. Use the date-range selector to specify the date range you wish to see. You can do this by dragging the handles on either side of the selector to choose the start and end dates.

6. Offerings data can be further filtered by fund or type of transaction (cash, check, electronic) by clicking on one of these items in the data below the timeline.

7. The data can be exported, printed, or saved as a report using the options in the upper-right of the screen.



Viewing Pledges from a Profile's Quick Links [New Profile View]

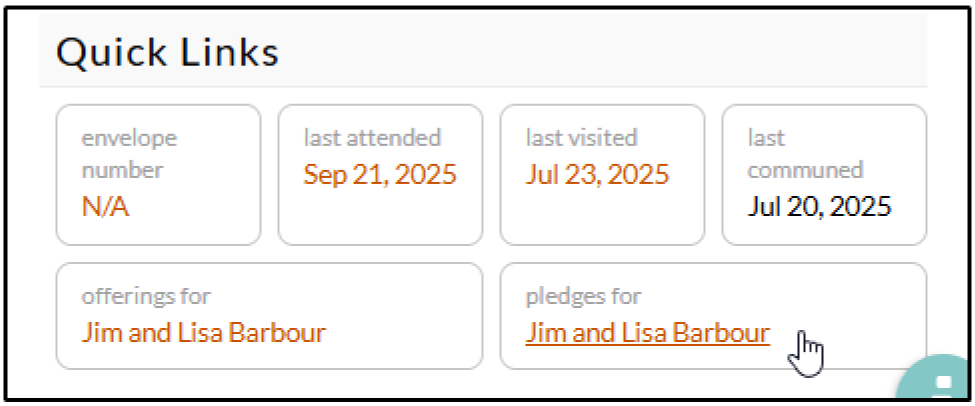
A person’s profile contains a link to view a giver's Pledges.

To view a person's pledge from their individual record,

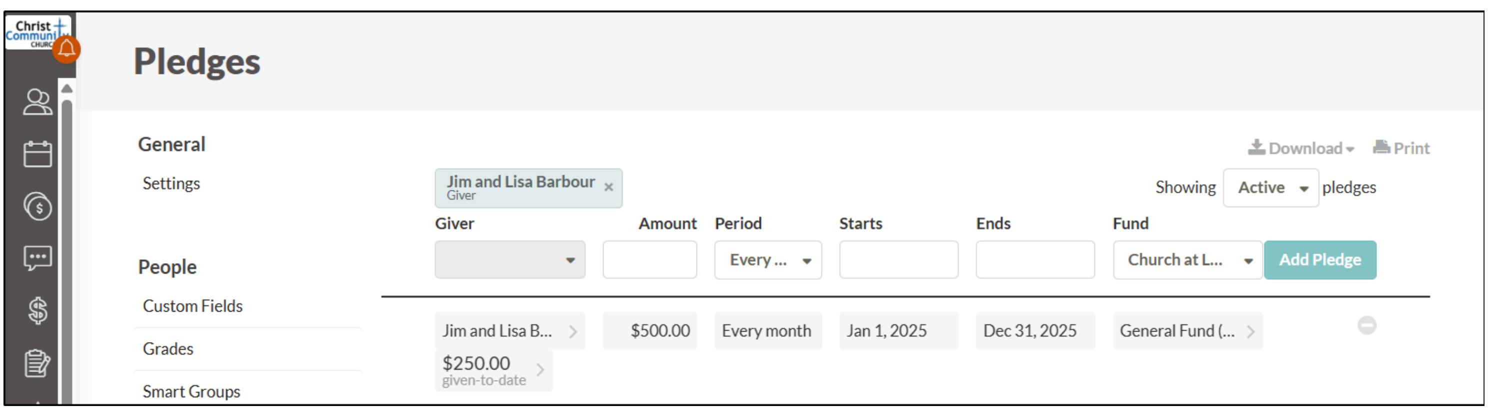
1. Go to the People view and click on the individual's name to open the profile.

2. The Quick Links section of a person's profile is on the lower-right of the Information tab, below Tags.

3. Click on the "pledges for" box, as seen below.



4. This will take you to the Pledges view, filtered on the desired giver.



5. For details on adding, editing, or deleting a pledge, see:

- Adding Pledges
- Editing Pledges

- Deleting Pledges

Adding, Editing, and Deleting Notes in Individual Profiles [New Profile View]

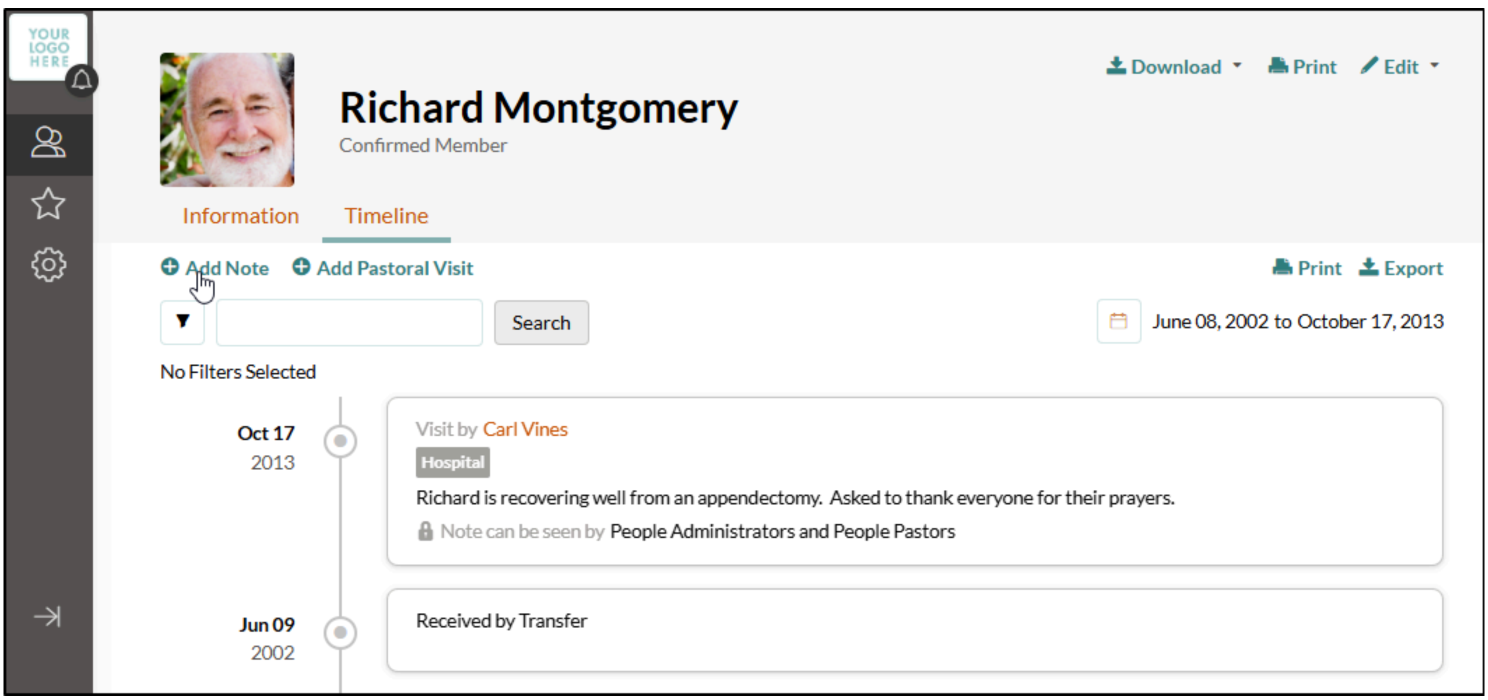
Users can add notes and pastoral visits to both household and individual profiles.

To create a note,

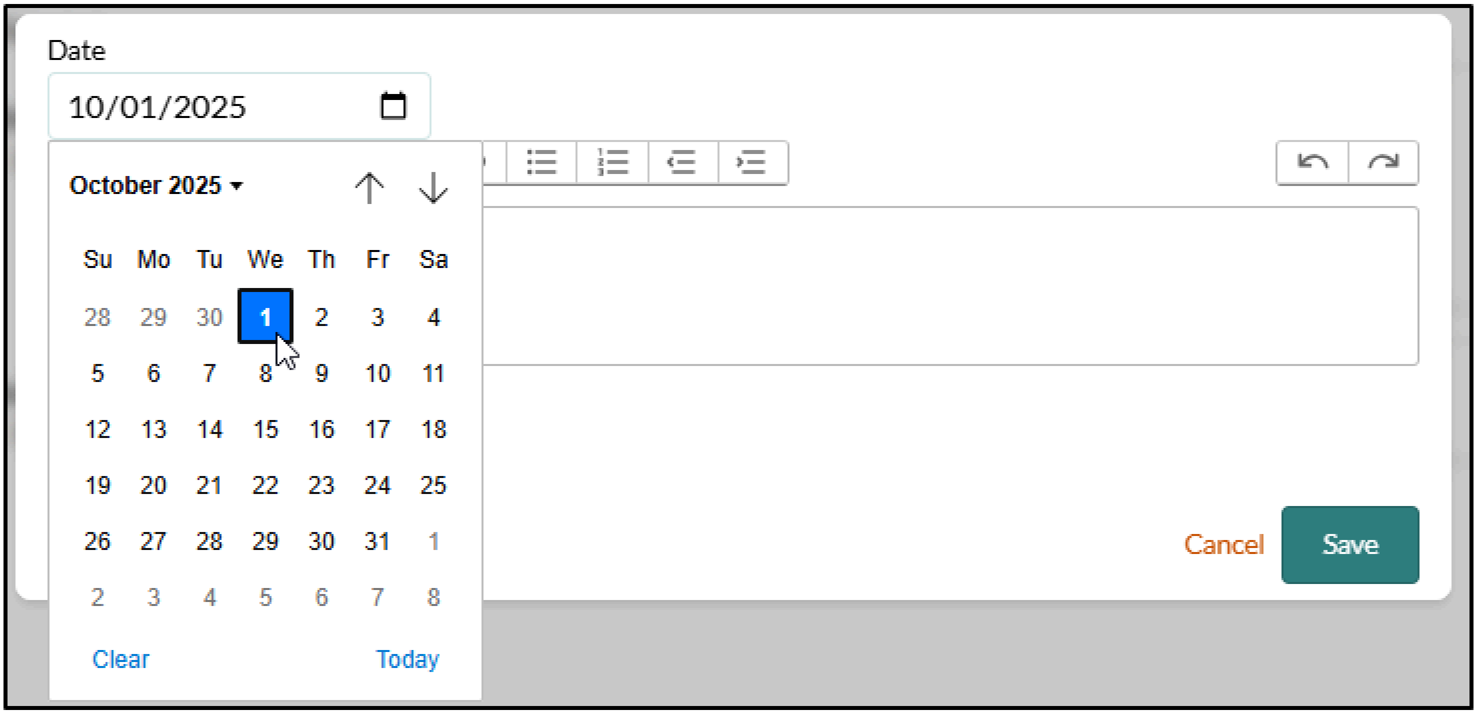
1. From the People view, click on the individual's name to open the profile.

2. Click the Timeline link just under the name banner to switch from the Information to the Timeline view in the profile.

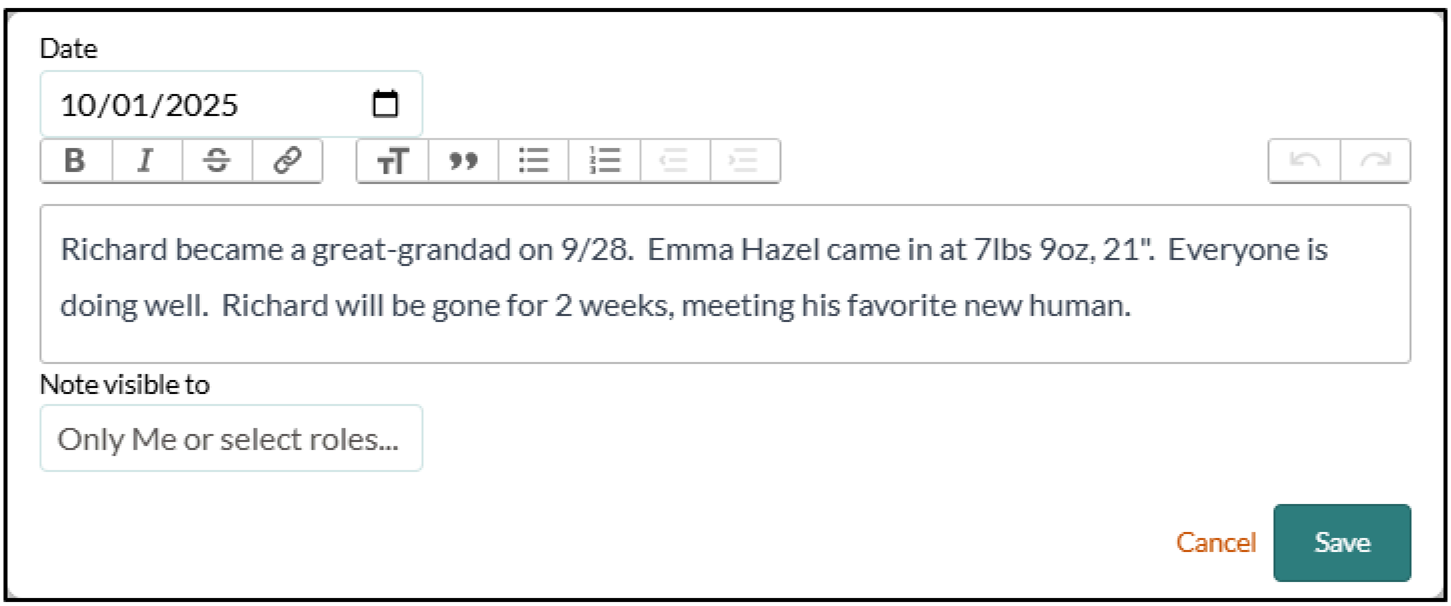
3. Click "Add Note".



4. Choose a date for the note to appear on the Timeline.

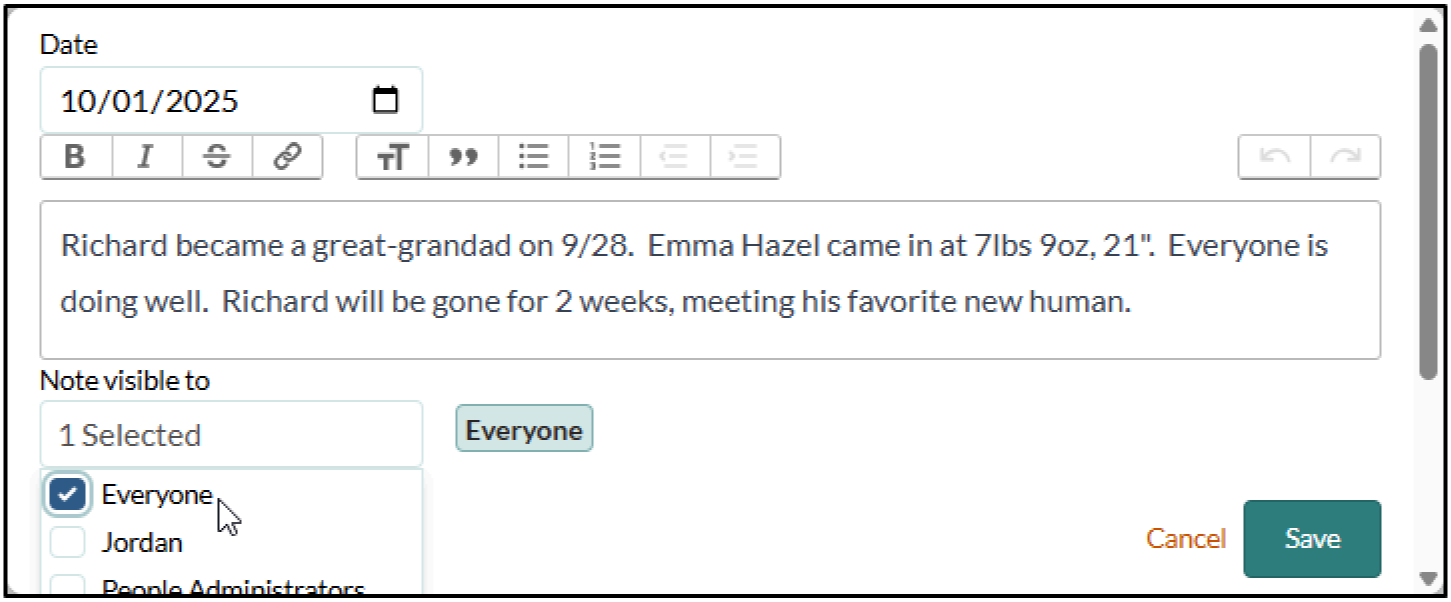


5. Click inside the first text box to type your note.



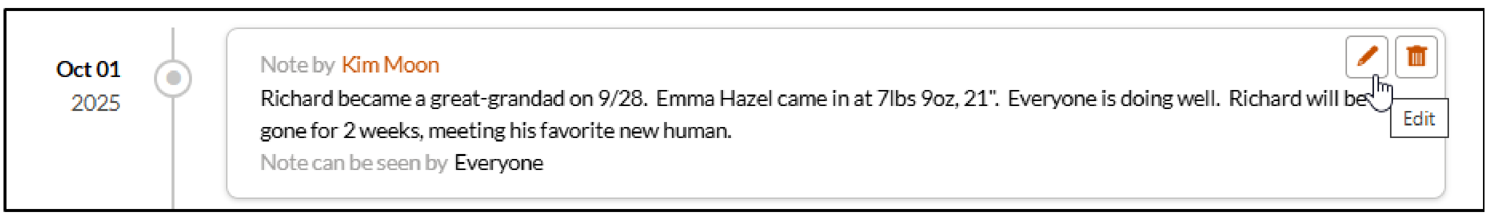
6. Click inside the second text box and check the boxes to select which People-related roles can see this note. Leaving this box blank will allow only the current user to view it.

7. Then click Save.



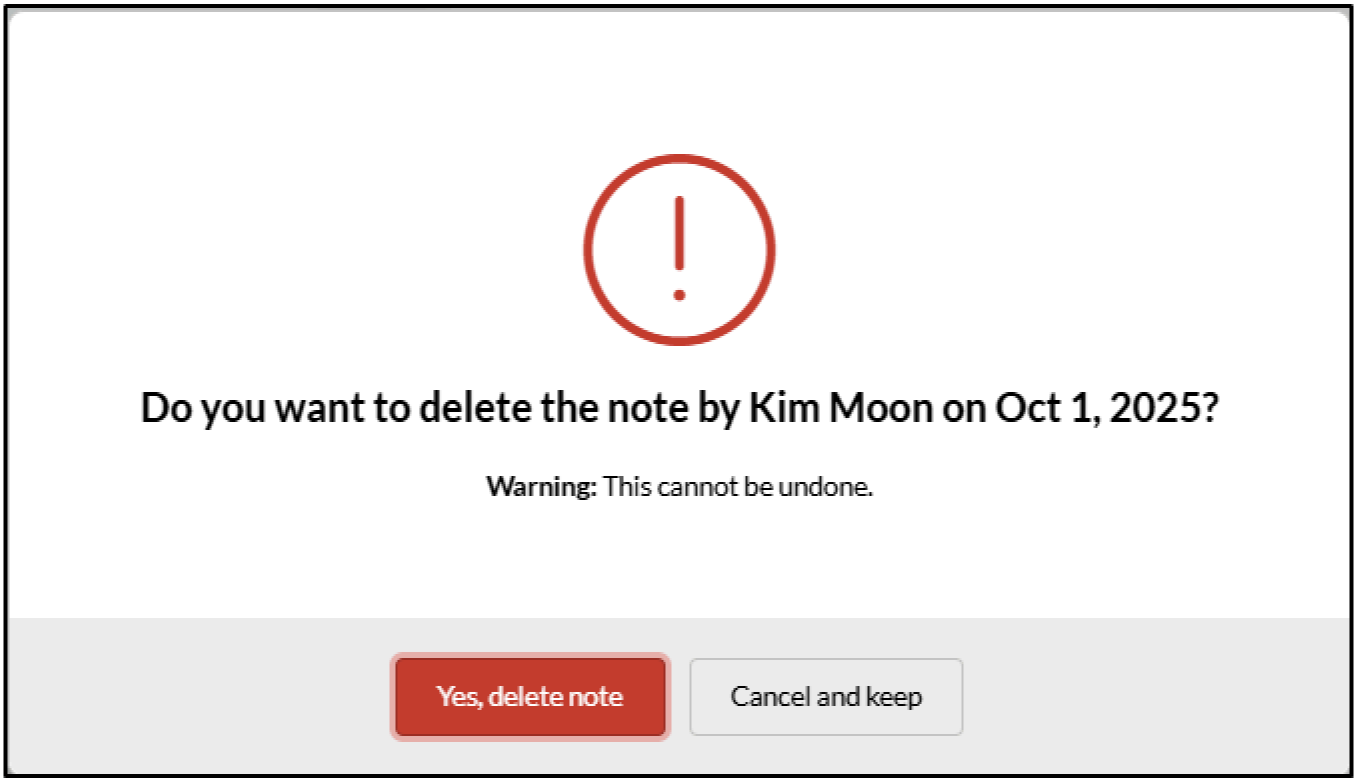
To edit a note,

Hover your mouse over the note, and click the edit pencil to return to the same view you had when creating the note.



To delete a note,

Hover over the note name, and click the trashcan. Then click "Yes, delete note", on the warning that arises.


Do you want to delete the note by Kim Moon on Oct 1, 2025?
Warning: This cannot be undone.
Yes, delete note
Cancel and keep

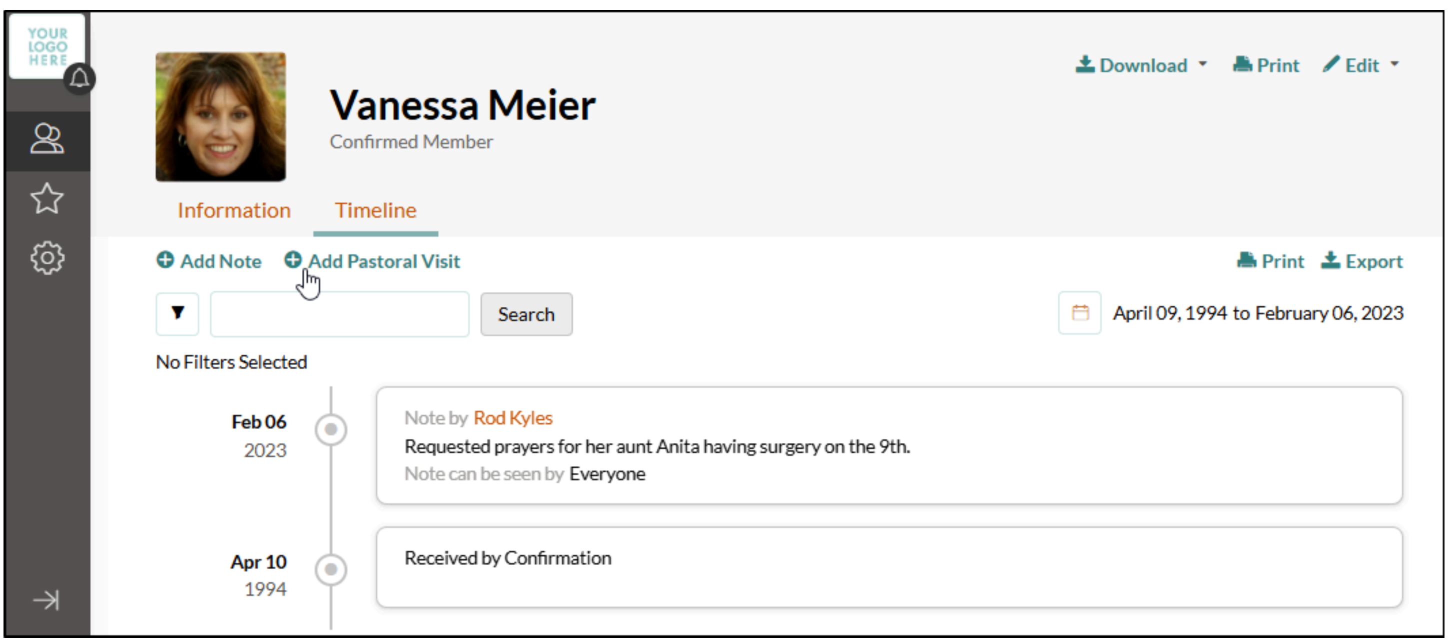
Adding, Editing, and Deleting Pastoral Visits in an Individual's Timeline [New Profile View]

The Pastoral Visits tool tracks when members have been visited so you can make sure that people are visited periodically or when needed. Pastoral visits are created and tracked in the Pastoral Visits tab in the main People view.

However, if you are working in the Timeline of an individual's Profile View, you can also click to add, view, or edit a Pastoral Visit.

To add a Pastoral Visit from an individual's Timeline,

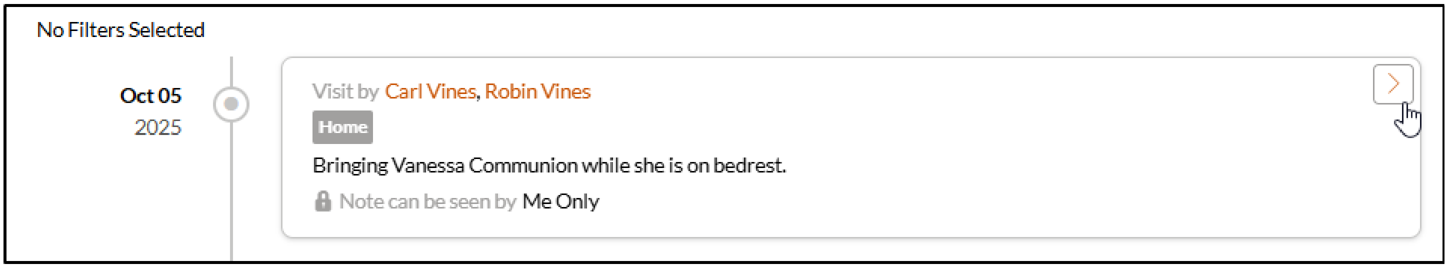
1. From within the People view, click on an individual's name to open their profile.
2. Click the Timeline link just under the name banner to switch from the Information to the Timeline view in the profile.
3. Click "Add Pastoral Visit"



4. This will take you to the main Pastoral Visits view, where you will proceed as usual. For full details of how to proceed there, see the Adding Pastoral Visits article.

Similarly, once a Pastoral Visit has been added, you can reach it for editing or deleting from the Profile View Timeline as well.

1. From within the People view, click on an individual's name to open their profile.
2. Click the Timeline link just under the name banner to switch from the Information to the Timeline view in the profile.
3. Find the visit in question, hover your mouse over it, and click the > icon to the right to take you to the Pastoral Visits view, so you can edit or delete the visit.



Navigating the Pastoral Visits View

Under the Pastoral Visits subheading in the People view, users can record upcoming or completed visits and other methods of contacting members of your congregation by the pastor or other church representative. These visits will appear in the Pastoral Visits calendar under Events, and on the timeline in the individual record of the person or persons being visited.

When adding a visit, users will select a date, the person or people being visited/contacted, the person who is visiting/contacting (does not have to be a pastor), and the type of visit, whether or not communion was provided, and notes, if desired. The distance traveled for the visit and the time can also be recorded.

The "Type" selection includes all default and custom types that have ever been used.

Users can add notes to the visits either here, or by navigating to the person or household record and then adding information and its visibility. This view then serves as a record of all the recorded visits.

Action buttons

Like other views, the Pastoral Visits view has action buttons for specific tasks.

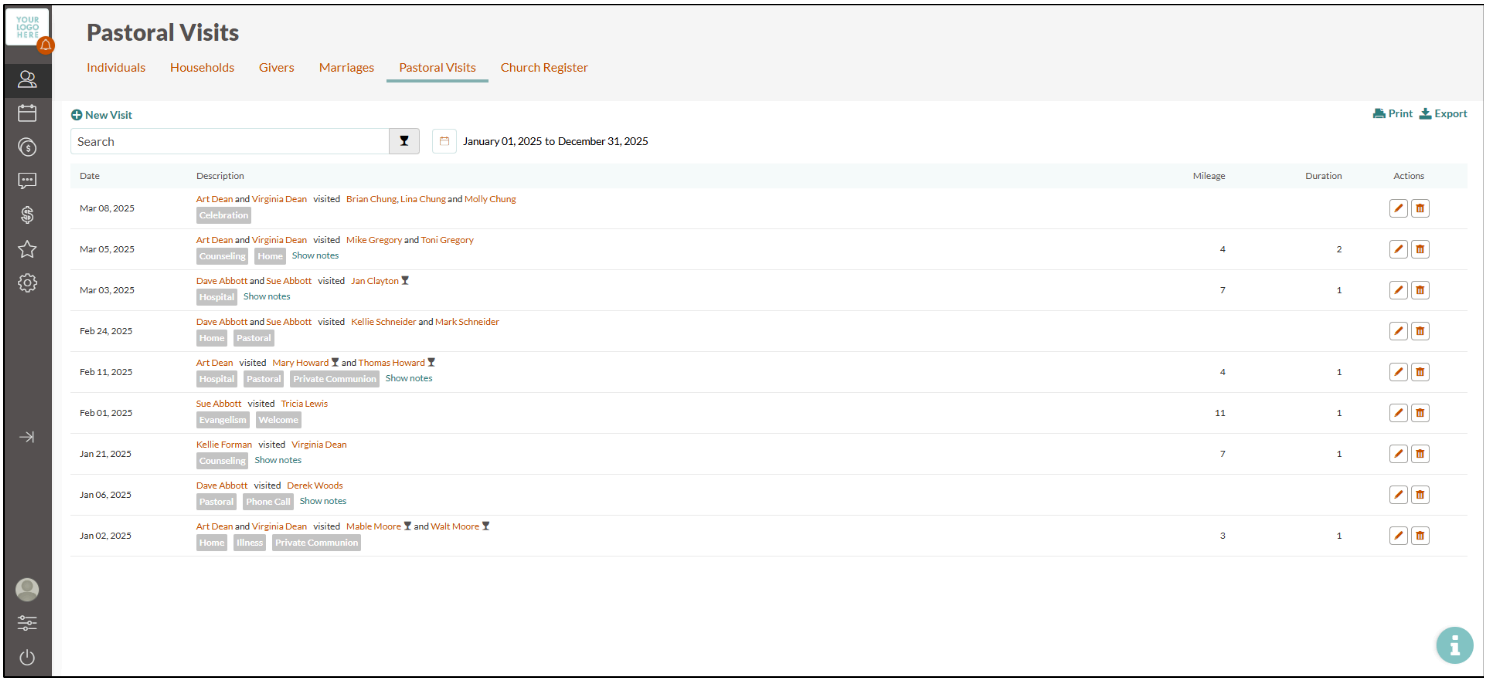
- New visit - Click here to open the box to add a new visit.
- Print - This action will open a print preview of all visible entries from your browser.
- Export - This action will export all visible entries into a CSV file you can edit and share.

Filtering

- Search bar - This allows you to type in a name, date, type, etc. to find a particular entry or entries in the list of pastoral visits. The chalice icon at the end of the search bar can be clicked to limit the view to only visits where communion was given.
- Date selector - The view will default to showing you any visits for the last 30 days. Click the calendar icon button to open a box to change the date range.

Pastoral Visit List

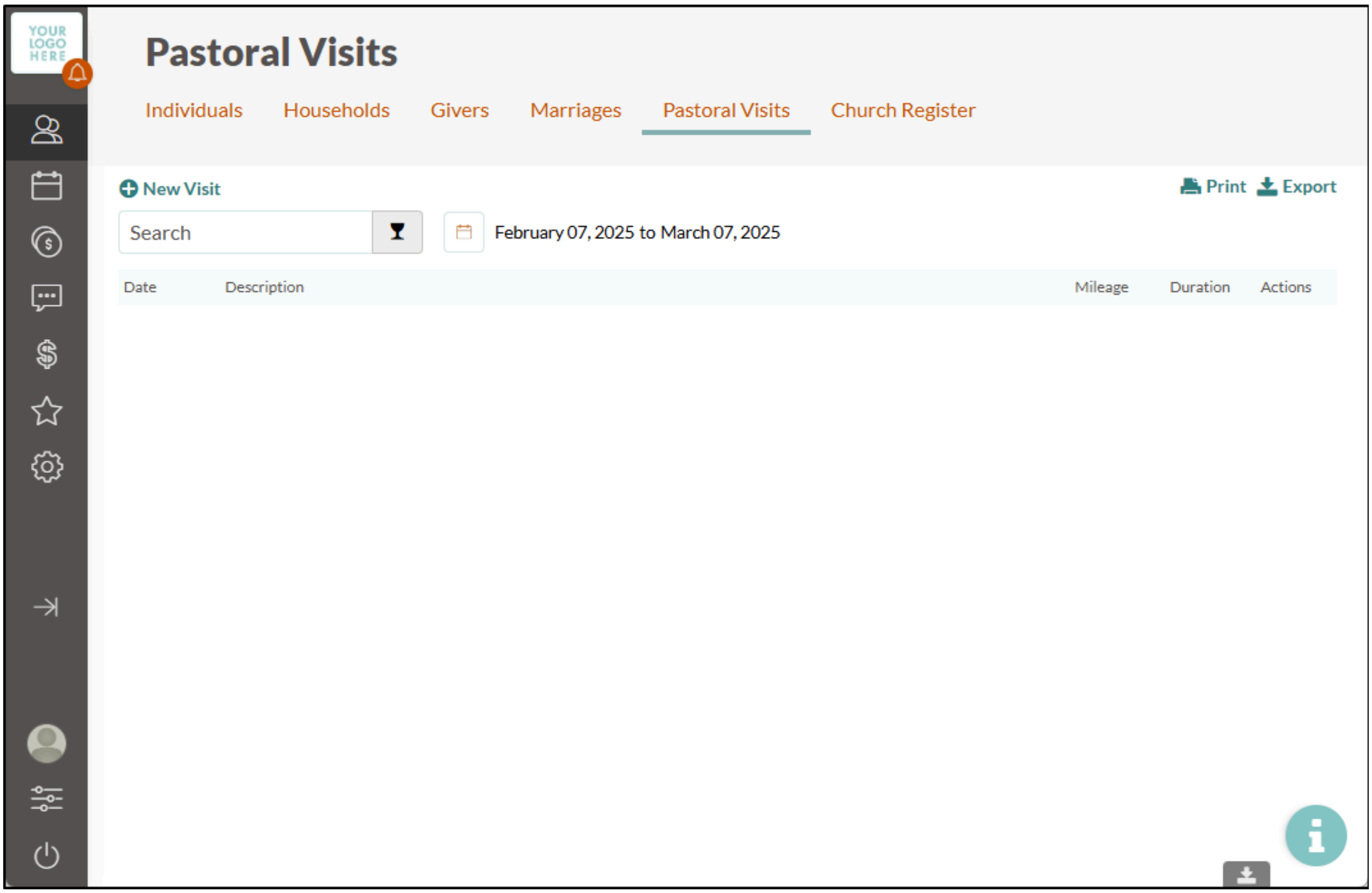
The list will show all pastoral visits for the date range selected. Click the Pencil icon to the right of a visit to open it for editing. Any field can be edited. To delete a pastoral visit, click the trash can icon to the right of the pencil.



Adding Pastoral Visits

Users can add past or future Pastoral Visits in the Pastor Visits view.

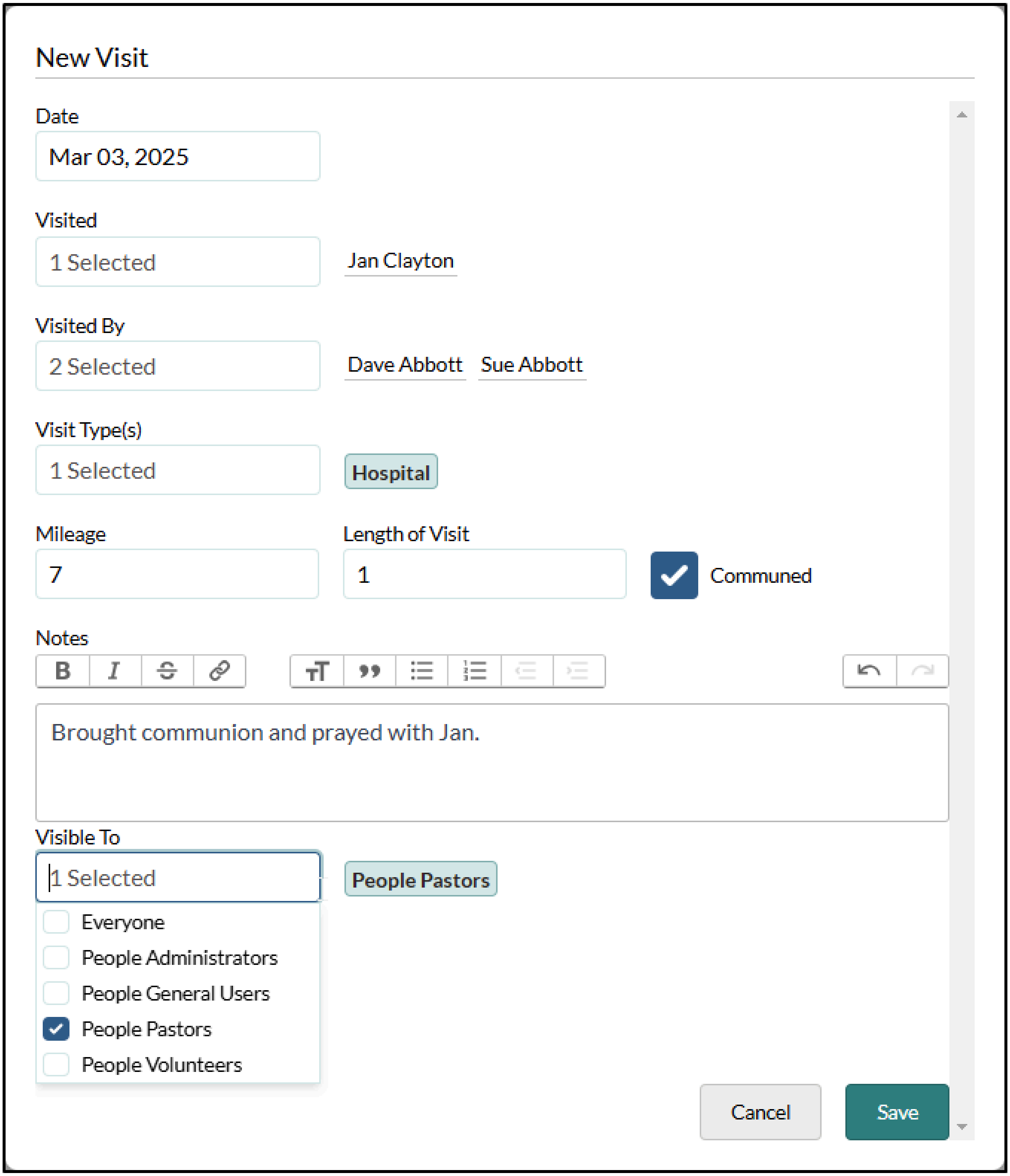
The Pastoral Visits view allows visits or other points of contact to be recorded so that pastors (or other church leaders, elders, staff, or volunteers) can keep track of the people they have visited, or should be visiting next.



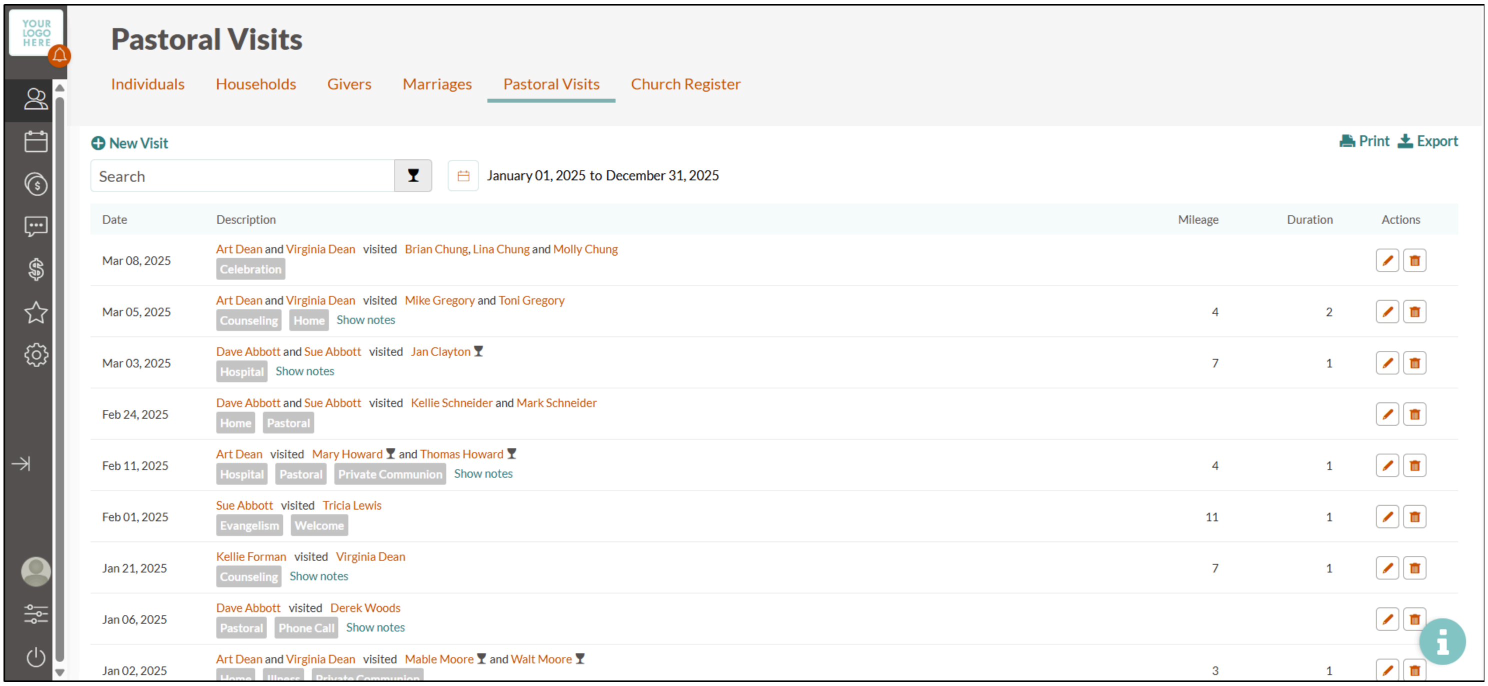
To add a new pastoral visit,

1. Click the People icon to get to the People view.
2. Click Pastoral Visits.
3. Click New Visit.
4. Click in the date field and use the calendar to select the date of the visit.
5. Use the "Visited" drop-down to choose one or more names of those being visited.

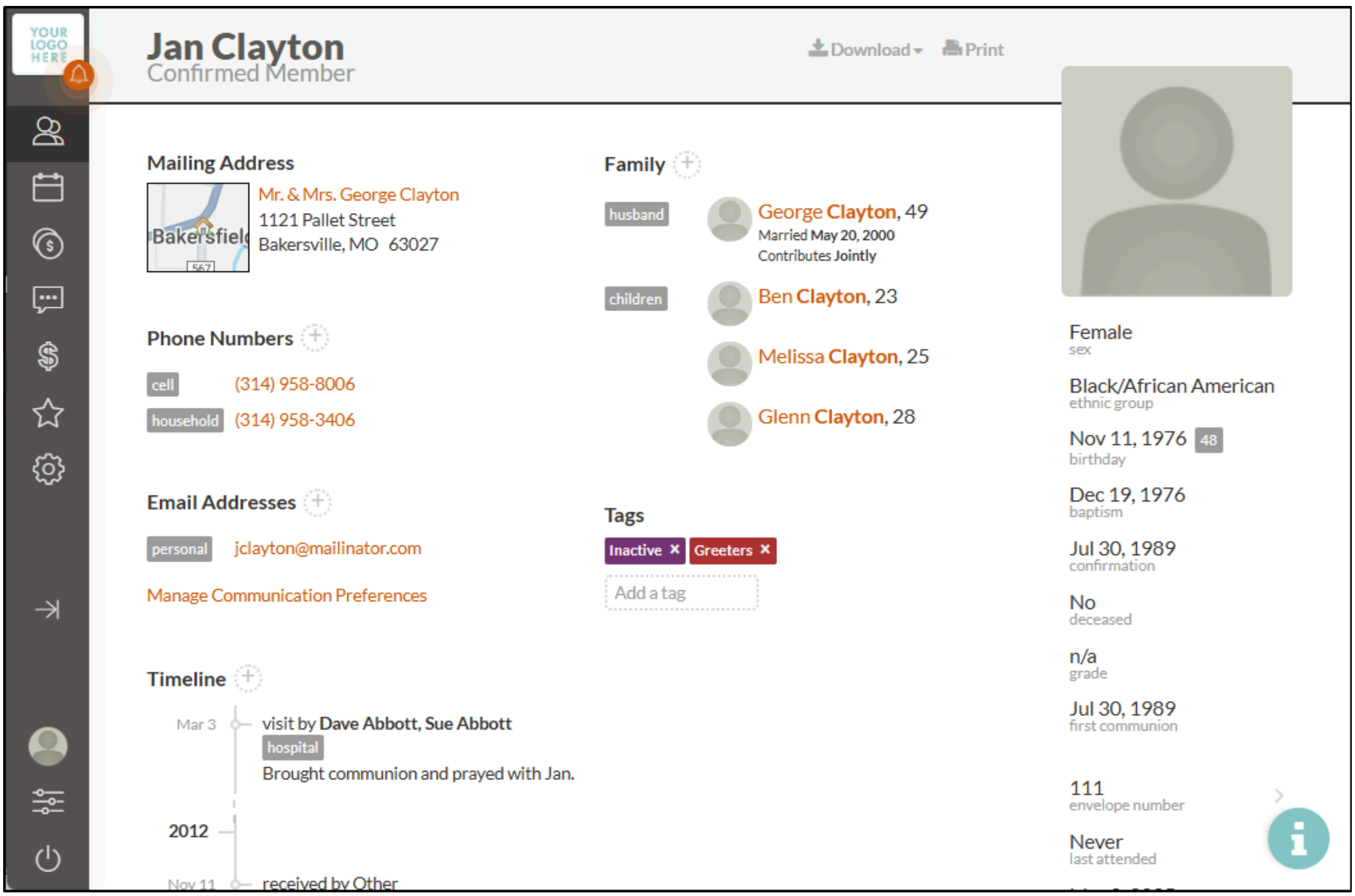
6. Use the "Visit Type(s)" drop-down to select the type or reason for the visit. Notes:
    - You can select more than one type.
    - The "Type" selection includes all default and custom types that have ever been used and is not recommended for information specific to a single visit. For this reason, the only way to remove type options from this field is to remove any Pastoral Visit entries with the type selected, so before adding a type, check the existing options carefully.
7. If recording mileage, enter the total miles for the visit (whole numbers, no decimal) in the "Mileage" field.
8. If recording time, enter the number of hours the visit took (whole numbers, no decimal) in the "Length of Visit" field.
9. Check the "Communed" box if communion was given.
10. You can enter notes in the Notes field if desired. Any notes saved here will be added to the visitee(s) timeline under the date of the visit. Or you can leave Notes here blank until after the visit, and make the addition either here or on the person's timeline after the visit (or add an additional note to the timeline after the visit). In either case, you'll want to click the "Visible to" box to select who can see the notes.
11. Click Save.



Once saved, the visit will be listed as shown below, as long as the date of the visit falls within the selected date range.



And here is the person record of our sample visitee, showing the visit and note in her timeline:

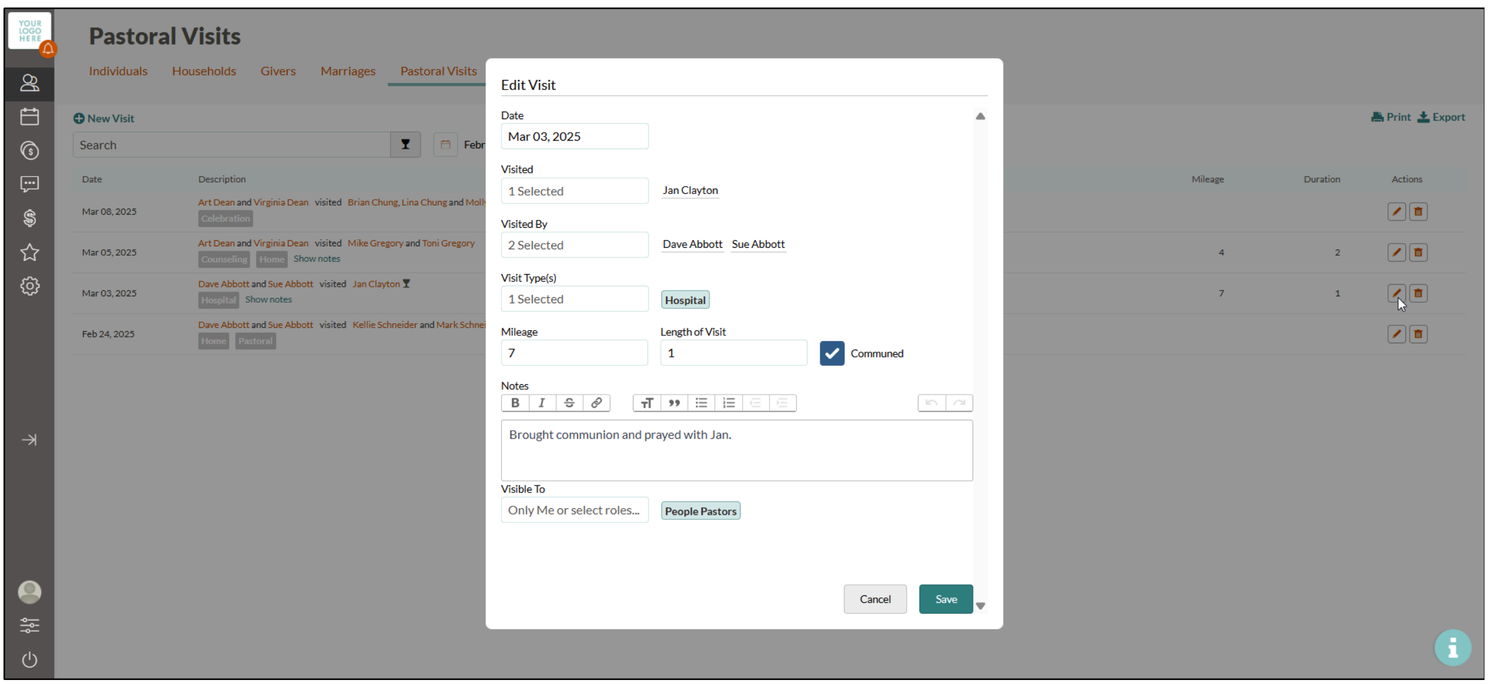


Editing Pastoral Visits

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

To edit an existing pastoral visit,

1. In the People view, click the Pastoral Visits tab.
2. Use the calendar and/or the search field to filter until you find the desired visit.
3. At the far right end of the row of the entry, click the pencil icon".
4. Make any desired changes, and click Save.

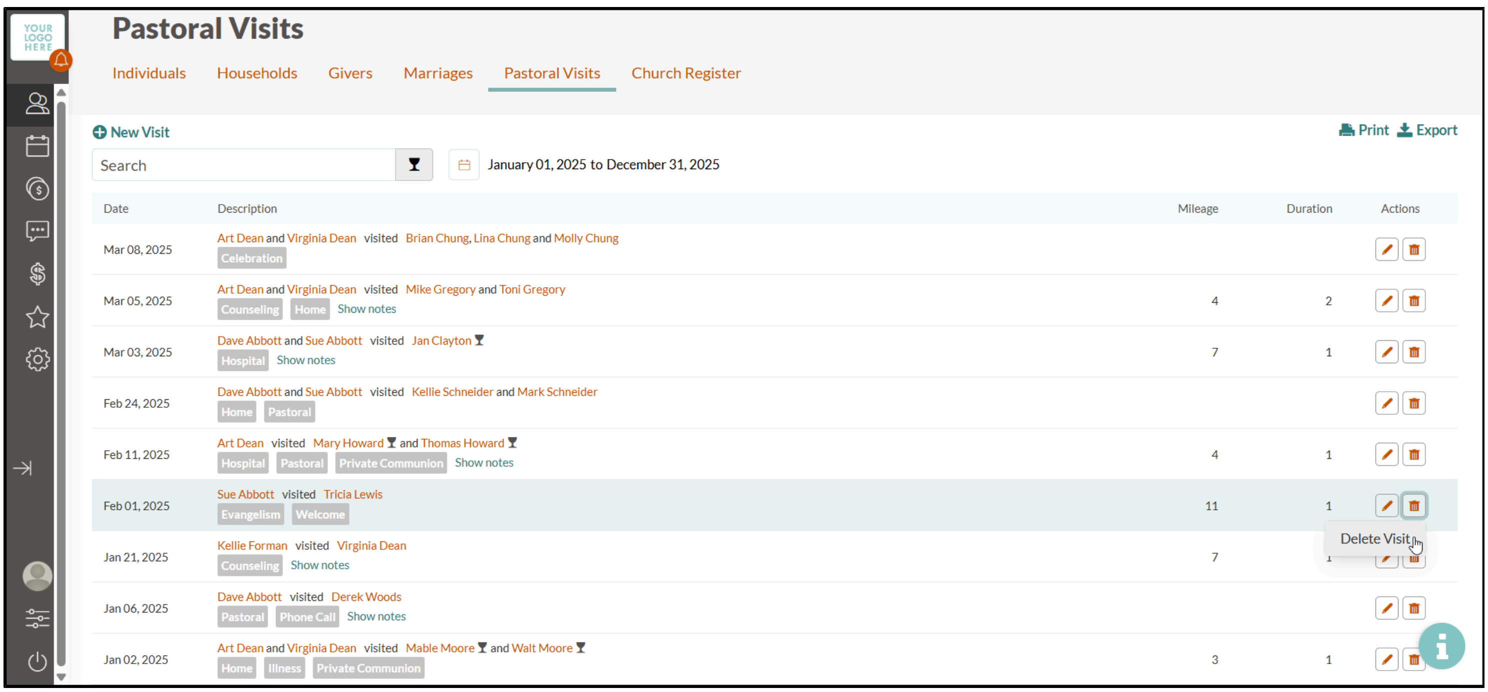


Deleting Pastoral Visits

If a pastoral visit was entered as planned but did not end up happening, you may need to delete the visit entry.

To delete a pastoral visit,

1. From the People's view, click on the Pastoral Visits tab.
2. Use the calendar and/or the search field to filter until you find the visit.
3. At the far right end of the row of the entry in question, click the trash can icon, and select "Delete Visit".

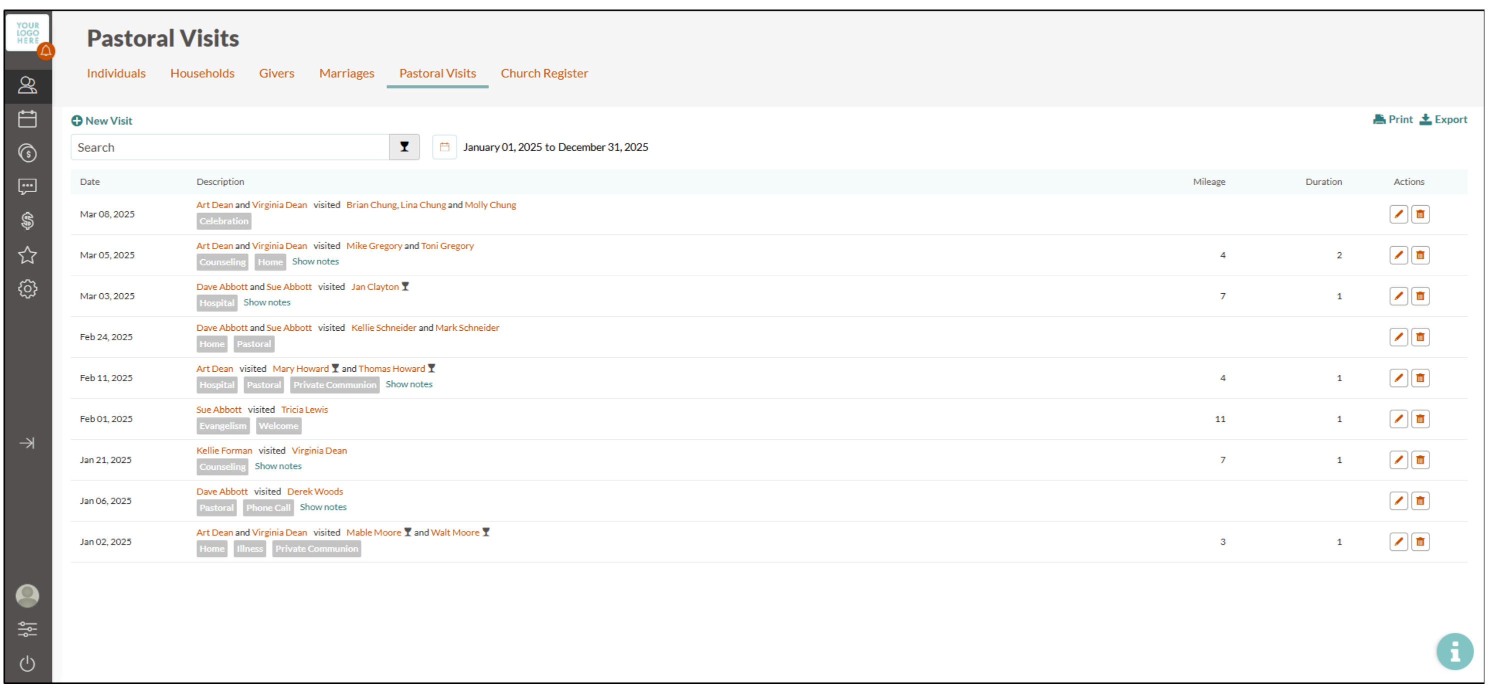


Printing or Exporting a Pastoral Visit List

Printing or exporting your Pastoral Visits list can help allow you to share a hard copy of your Pastoral Visits information with others, such as your elders.

To print or export your pastoral visit list,

1. In the People view, click the Pastoral Visits tab.
2. Use the calendar button to set the date range of visits you want to export.
3. If filtering, type in the visitor, the visitee, or the visit type. You may also click the chalice to show visits with Communion.
4. At the upper right of the view, click to Print or Export the list.
   - Click "Export" to export the list into a CSV file.
   - Click “Print” to open the list in a new browser tab. To print from the browser, press CTRL+P or right-click the page and choose “Print”.



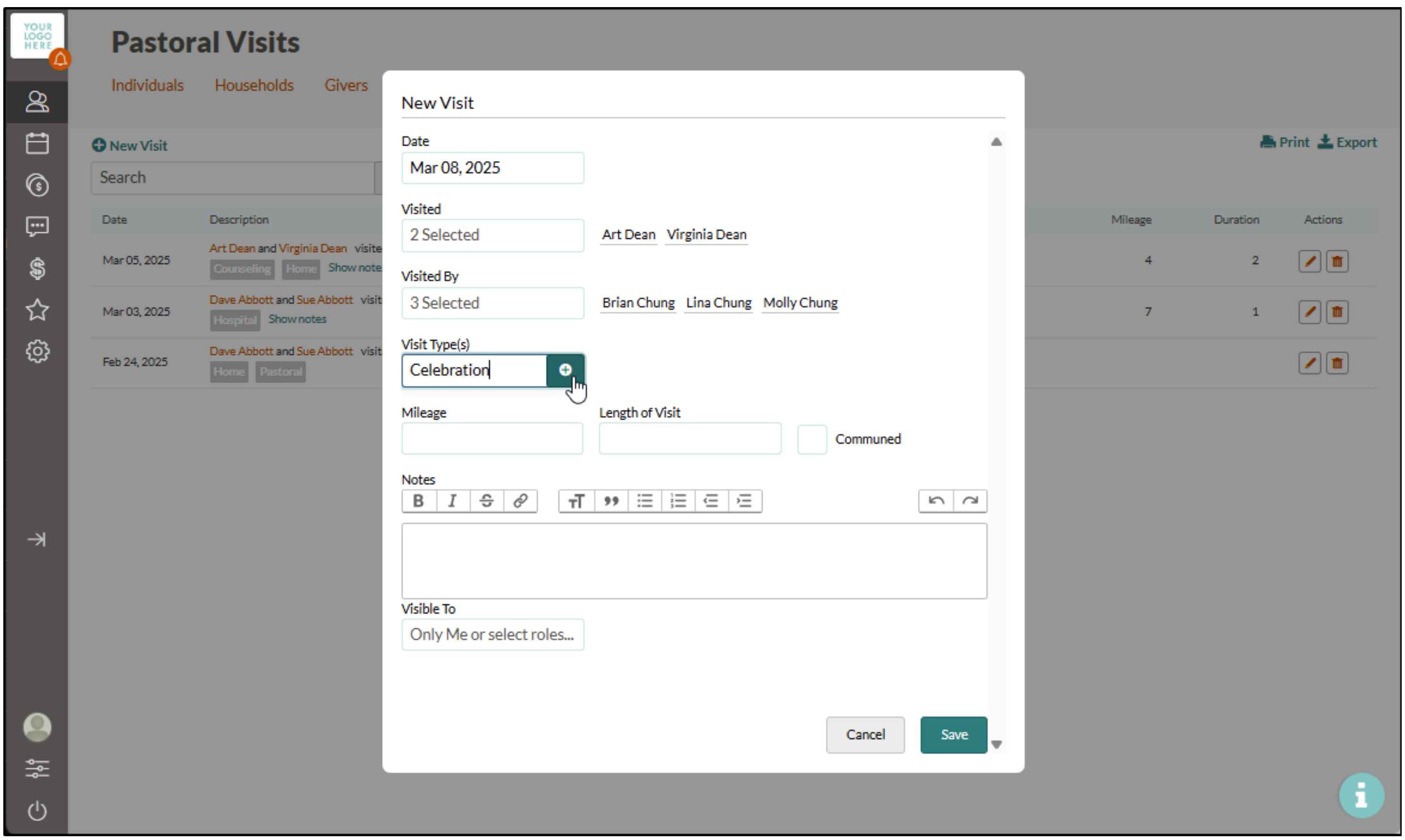
Adding a Type Category for Pastoral Visits

Church360° offers a set of visit types to choose from when recording your pastoral visits. These likely cover most of the types of visits you may want to record, but in case it does not, you also have the option to add new visit types when entering a pastoral visit.

Please note: Once a new type has been added, it cannot be deleted without deleting all visits that have that type selected, so check and make sure that there's not already an existing type that suits you before adding.

To add a new type while adding a new visit in the Pastoral Visits view,

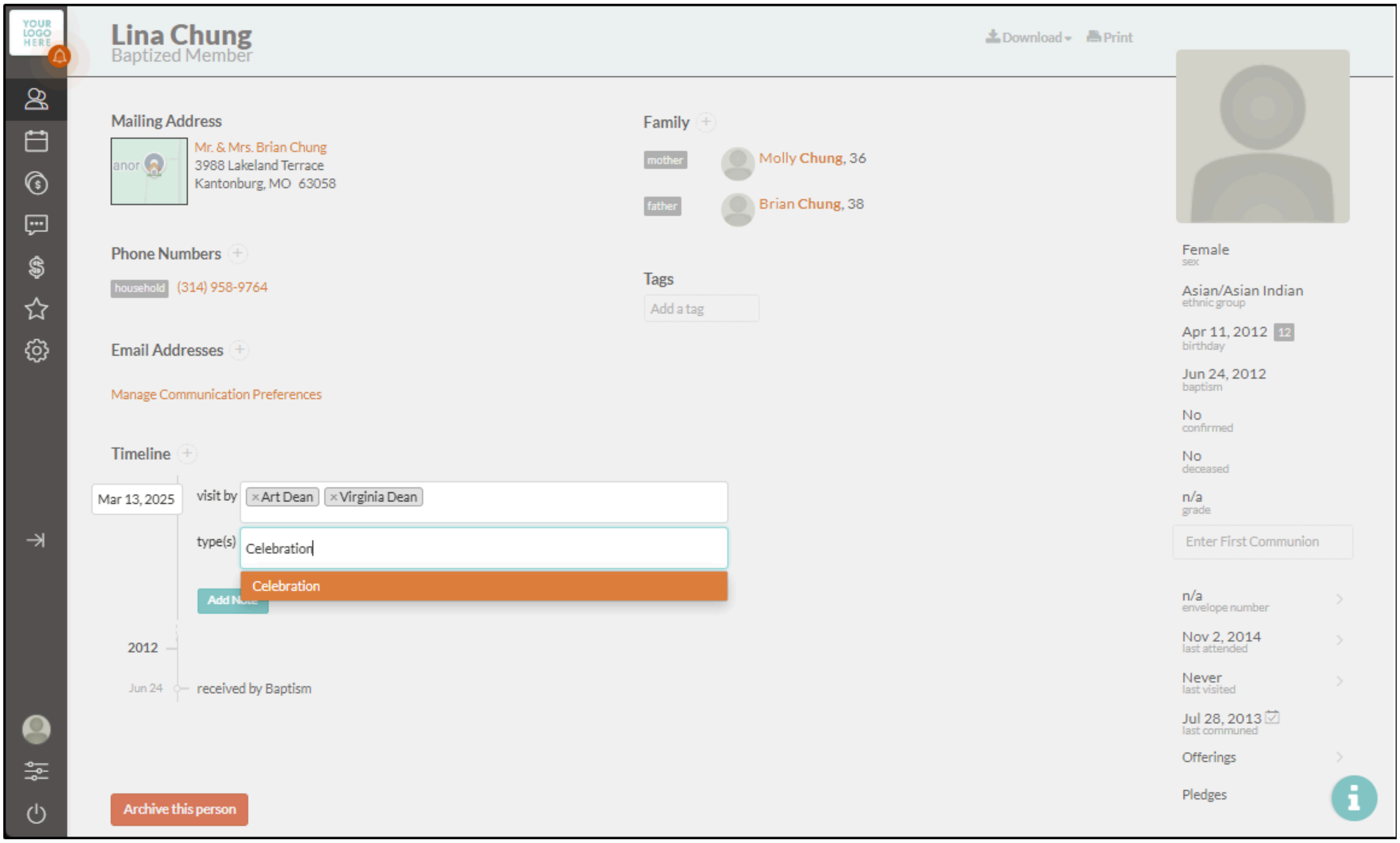
1. In the "New Visit" window, click in the "Visit Type(s)" field.
2. Start typing where it says "Select...", and you'll see a plus sign appear.
3. Finish entering the name of the new type you want to add, and click the plus sign. This will both add and select the new type.



To add a new type while adding a new visit in an individual record,

1. Click the plus sign in the Timeline and select Pastoral Visit.

2. In the "type(s)" field, enter the new type and press Enter. This will both add and select the new type.



Navigating the Church Register view

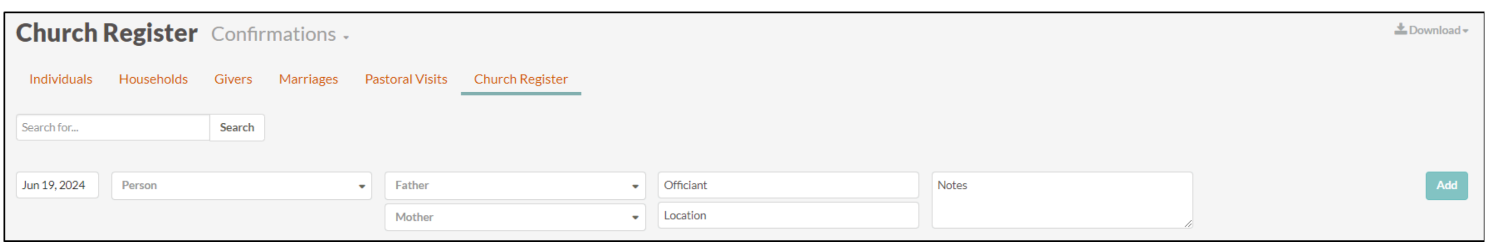
Under the People view, users can use the Church Register view to add and edit entries to keep track of various registries for their church. Users can choose to use existing person records or type in the person's first and last name in order to create a new person record in the system.

Modes

Similar to the People view, the Church Register view contains four distinct registries, based on the event. Users can change the mode by clicking on the current mode heading and using the drop-down menu to select another mode.

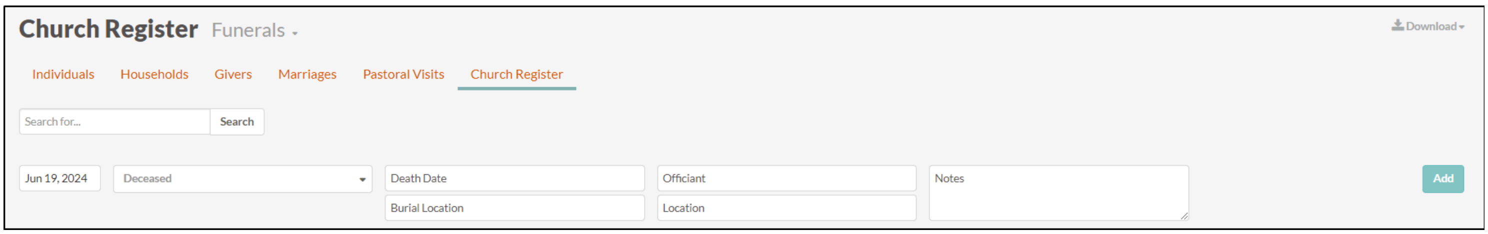
- Baptisms - This registry offers the ability to add a baptism record along with parental and officiant relationships, locations, sponsor names and other notes.
  - Adding parents to a registry record will create parental relationships on the person's record.

- Confirmations - This registry offers the ability to add a confirmation record along with parental and officiant relationships, locations, and other notes.
  - Adding parents to a registry record will create parental relationships on the person's record.



- Weddings - This registry offers the ability to add a wedding record along with the couple's names, license number, return date, officiant, location, witnesses and other notes.
  - Adding a couple to a registry record will create a marital relationship on both of their person records.

- Funerals - This registry offers the ability to add a funeral record along with the deceased's name, death date, burial location, officiant, location, and other notes.
    - Adding a death date to a registry record will mark the person as deceased and having a death date on the person's record.



Action button

Like other views, the Church Register view has action buttons for specific tasks. Currently, there is only one available action for the Church Register.

- Download - This action will export all visible entries into a CSV or Excel file that you can edit and share.

Search Bar

Users can use the search bar to filter the list of entries for the selected registry.

Church Registry List

Below the entry row, all available registry entries can be seen for reference. Entries can be clicked to open them for editing. Any field, except for the person for the registry, can be edited. Hovering over an entry produces a faint grey minus sign to the far right of the record can can be clicked to delete an entry permanently.

Adding and Editing Church Register Entries

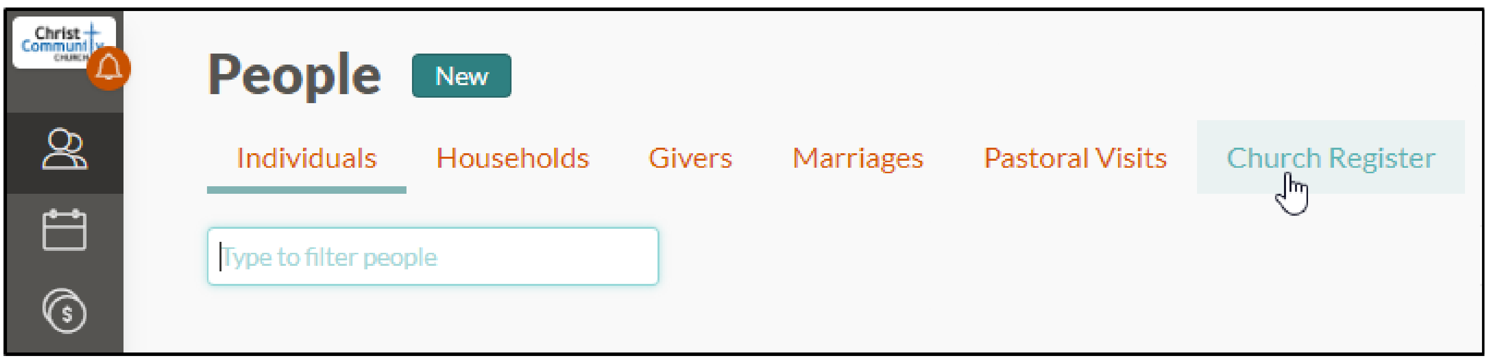
Users can add and edit entries into the Church Register not only as a log of important life events happening at the church but also to update new or current person records with event information.

Users can create new person records and add event information pertaining to those records. For example, adding a Baptism registry entry for a person will add that baptism date to their person record.

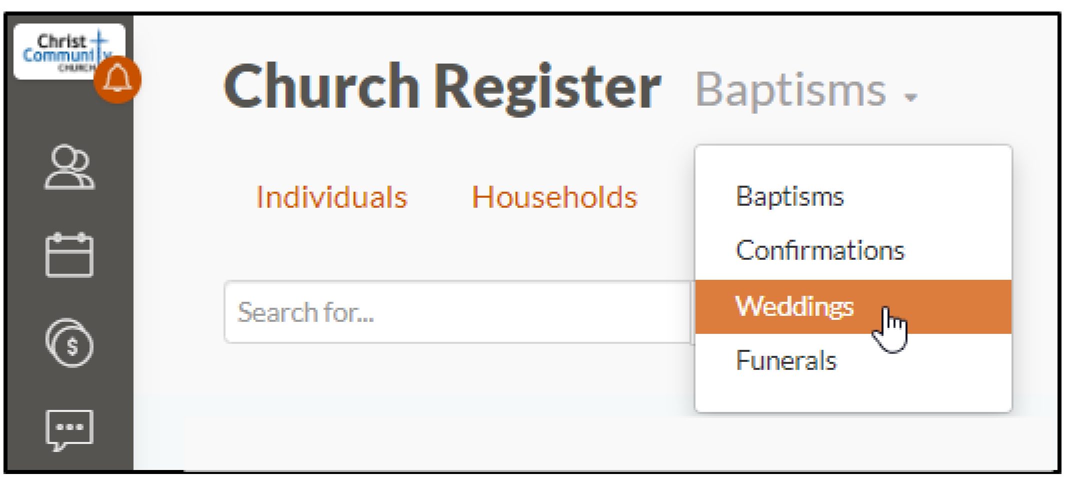
To add a new registry entry,

1. Click on the gear icon to go to People.

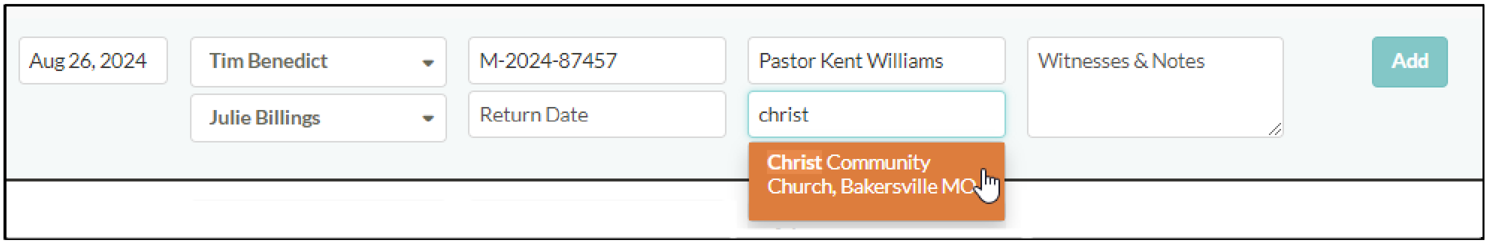
2. Go to the Church Register view.



3. Choose the register you want to view.



4. On the entry row at the top of the list, fill in the fields for person records, date of the event, and additional information as needed. The only required information for register entries is the Date, Individual name, Couple's name (for Weddings), and death date (for Funerals).



5. Click "Add" to add the event to the Church Register.

To edit an existing registry entry,

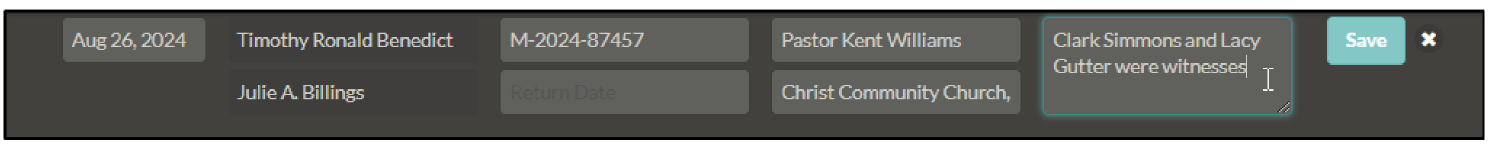
1. Click on the gear icon to go to People.

2. Go to the Church Register view.

3. Choose the register you want to view.

4. Click a blank area on the row of the visit you need to edit.

5. Edit the date or addition fields as needed.



- If you need to change the person records involved, it's recommended to delete the row entirely and recreate the entry.

6. Click "Save" to save your changes to the Church Register.

Church360° Members Help Center › People › Church Register

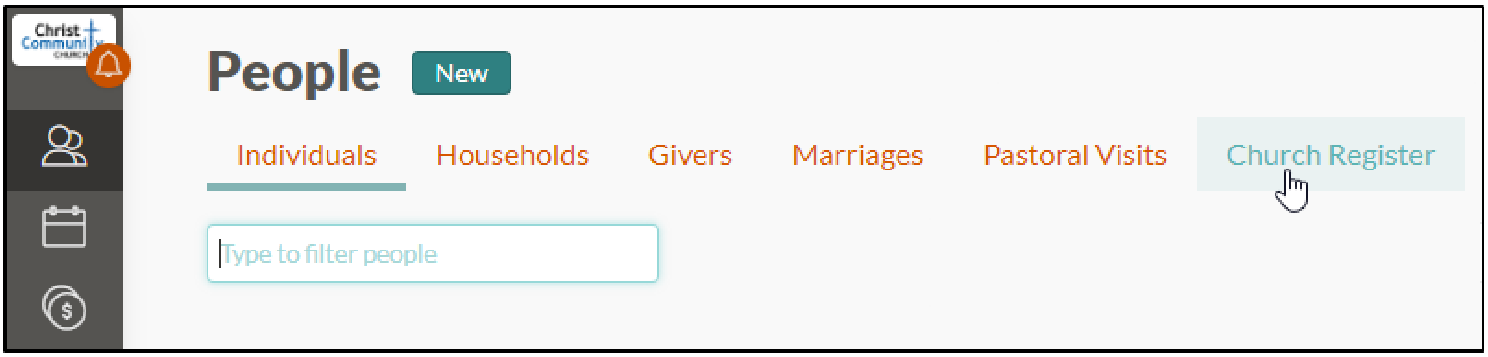
Deleting Register Entries

In the event of duplicate entries or incorrect person records, it may be necessary for an entry to be deleted.

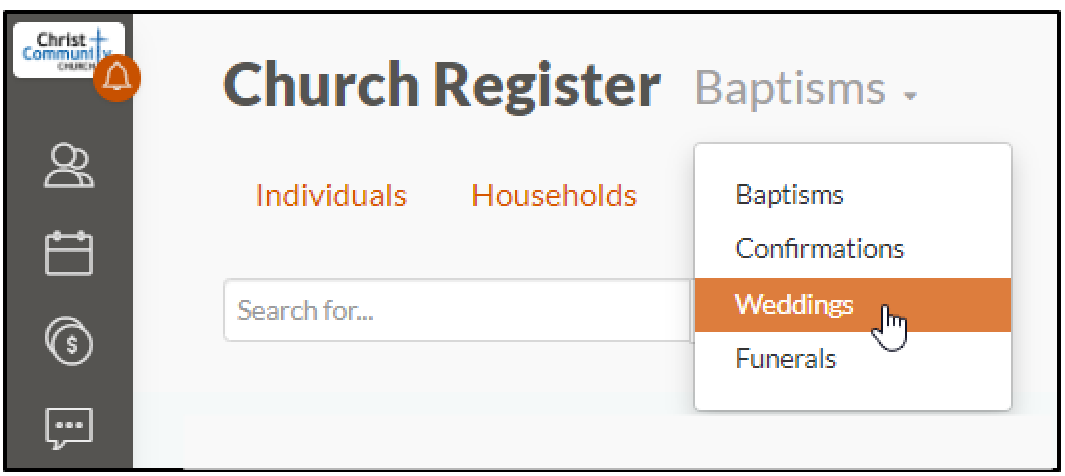
To delete a registry entry,

1. Click on the gear icon to go to People.

2. Go to the Church Register view.



3. Choose the register you want to view.



4. Click the gray minus sign on the right side of the row you need to delete.

5. Click the red "Delete" button to confirm your event deletion.

Note: Any fields updated from a registry entry, like a marriage from a wedding registry entry, will be cleared out if the corresponding entry is deleted.

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.

To print or export a church register,

1. Click on the gear icon to go to People.

2. Go to the Church Register view.

3. Choose the register you want to view.

4. At the upper right of the view, click "Download" to export the register into a CSV or Excel file.

Navigating the Custom Fields view

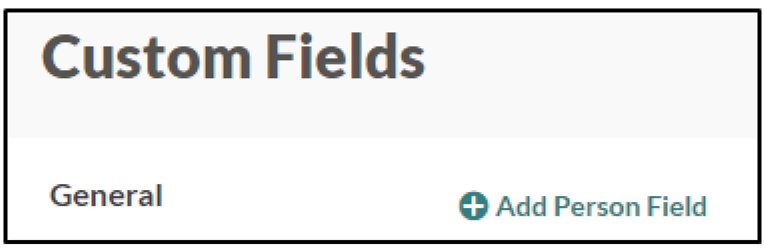
The Custom Fields view contains all fields created in the system (via a transfer from a different software) or manually by a user in the software that addresses a distinction in person or household records that the current fields in Church360° didn't address.

Users can create, edit, deactivate, or delete these fields as they use the software.

Action buttons

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

- Add Person Field - This option creates a new entry for a field to show in a person's individual record or Individuals mode on the People view.
- Add Household Field - This option creates a new entry for a field to show in a person's household record or Households mode on the People view.



Custom Person and Household Field List

The first section under Custom Fields shows all available custom fields that have been created in the system for individuals and the second section contains those for households.

All Custom Fields and their details are listed in their respective sections.

- Name - Displays the name of the Custom Field.
- Type - Displays the type of Custom Field. For more information on field types, please scroll down to see Types of Custom Fields.
- Visible To - Displays which People-related roles can see this field in a person or household record.
- Records with field in use - The untitled column displays the number of people with this field selected or filled in. Clicking on this number will open a People view of all relevant individuals selected.

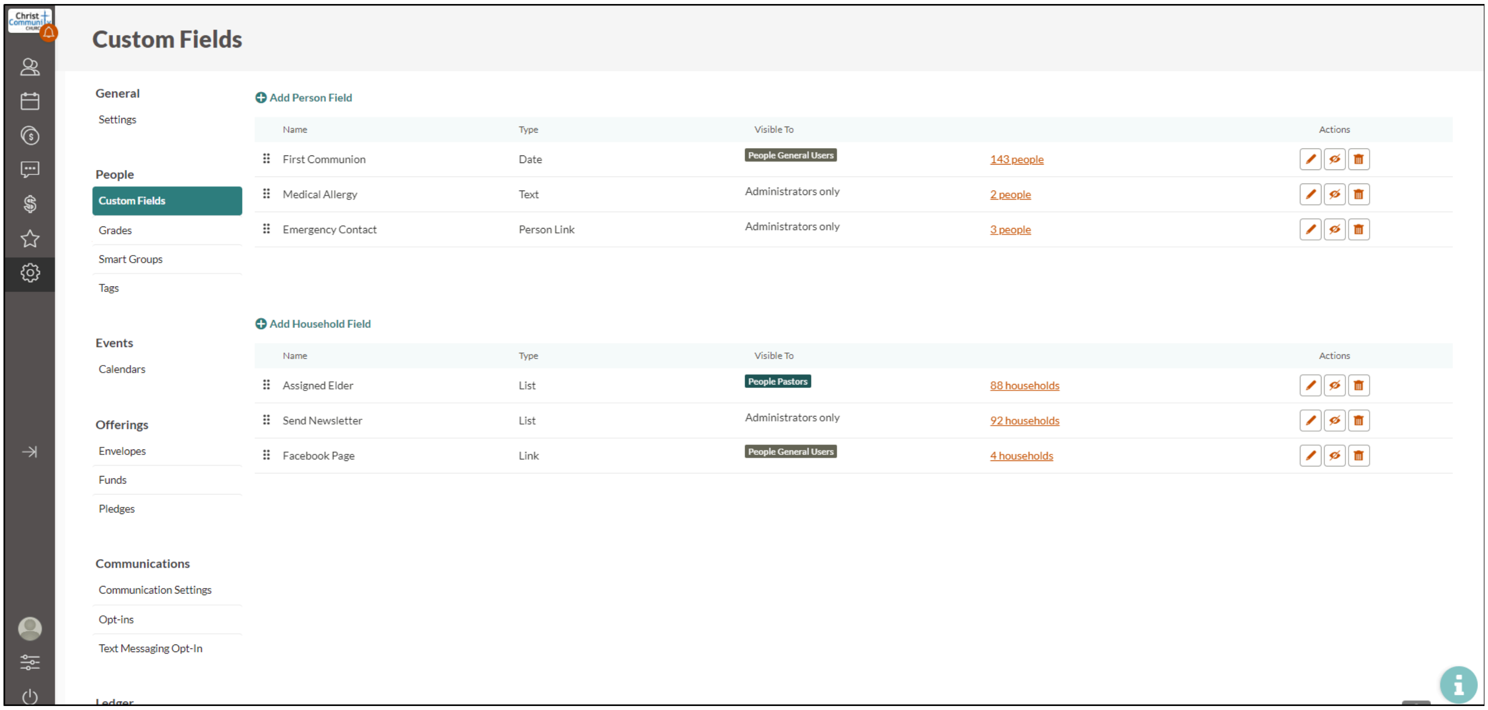
Actions for custom fields

- Edit Field - The pencil icon to the far right of a field name will open it for editing.
- Deactivate Field - The eye icon to the far right of a field name will hide it from the record view. However, the information within the field is retained. Clicking the eye again will activate the field for use again.
- Delete Field - The trash can icon to the far right of a field name will delete it from the view.

Types of Custom Fields

Different types of custom fields are available that can help with different designations for your records with some types allowing for more safeguards for data entry.

- Text - This type of field is simply a text box that users can enter in up to 255 characters, like a favorite Bible verse or a person's birthplace. It is not recommended for general notes for a person.
- Date - This type of field will allow users to select a specific date from a calendar, like a First Communion date. This field can be used to create an anniversary calendar to be shown on the Events calendar if needed. Partial dates are not applicable for this field.
- List - This type of field allows users to choose pre-populated options from a drop-down menu, like an assigned elder or ministry group. When selecting this field type, administrators can add and remove options in the text box below the drop-down menu, with each options on its own line.
- Link - This type of field allows users to add a URL to the field that creates a link that others can click on to be taken to a third-party site or page, like a Facebook page.
- Person Link - This type allows users to select from a drop-down list of all available person records to attach to the record in question, like an emergency contact or sponsor.


Custom Fields
General
Settings
People
Custom Fields
Grades
Smart Groups
Tags
Events
Calendars
Offerings
Envelopes
Funds
Pledges
Communications
Communication Settings
Opt-ins
Text Messaging Opt-In
Ledger
Add Person Field
Name
Type
Visible To
Actions
First Communion
Date
People General Users
143 people
Medical Allergy
Text
Administrators only
2 people
Emergency Contact
Person Link
Administrators only
3 people
Add Household Field
Name
Type
Visible To
Actions
Assigned Elder
List
People Pastors
88 households
Send Newsletter
List
Administrators only
92 households
Facebook Page
Link
People General Users
4 households

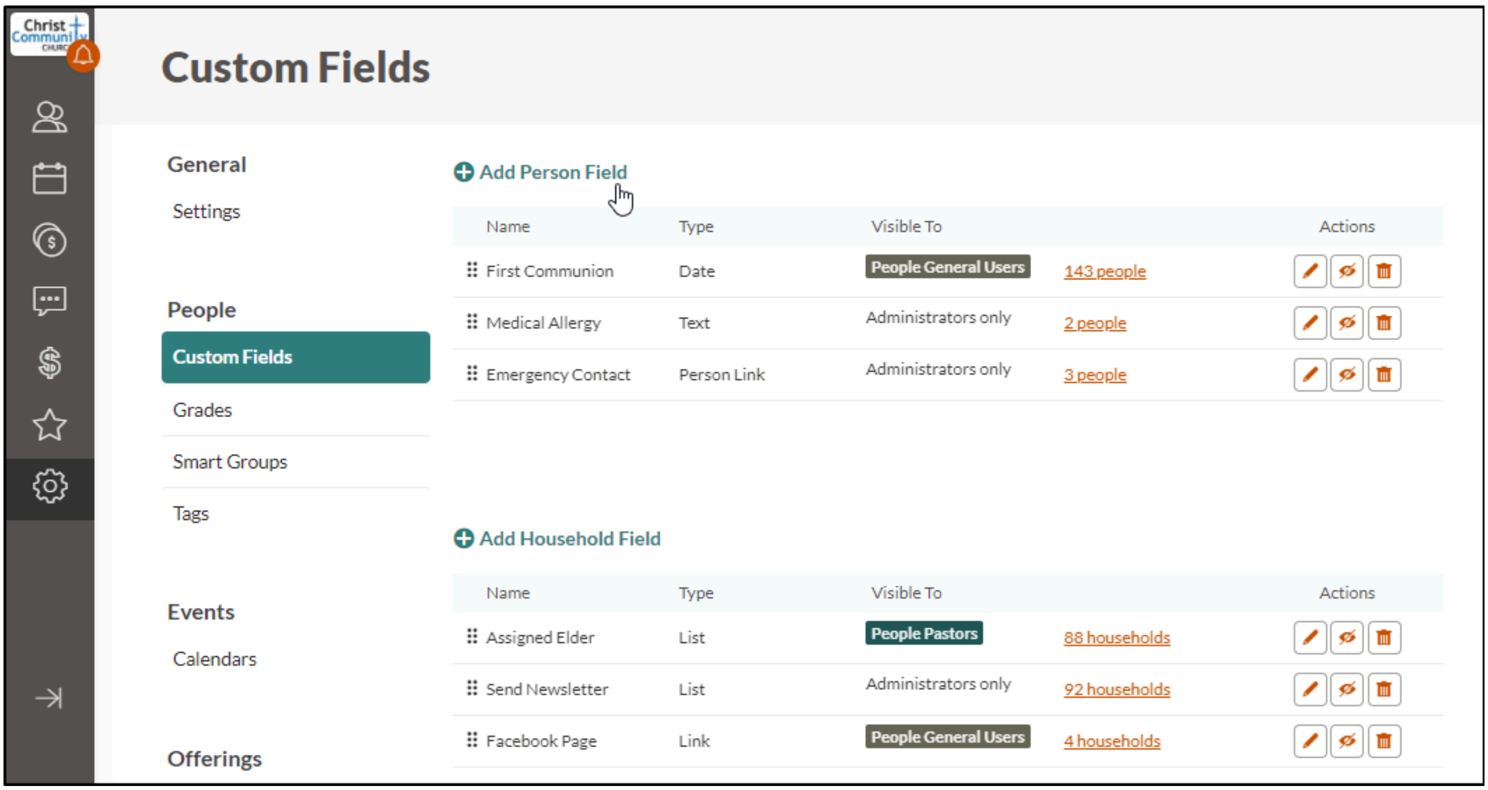
Adding Custom Fields

If you find there is some information that you would like to record but can't find an appropriate field for, one of your options would be to create a custom field.

To add a new custom field,

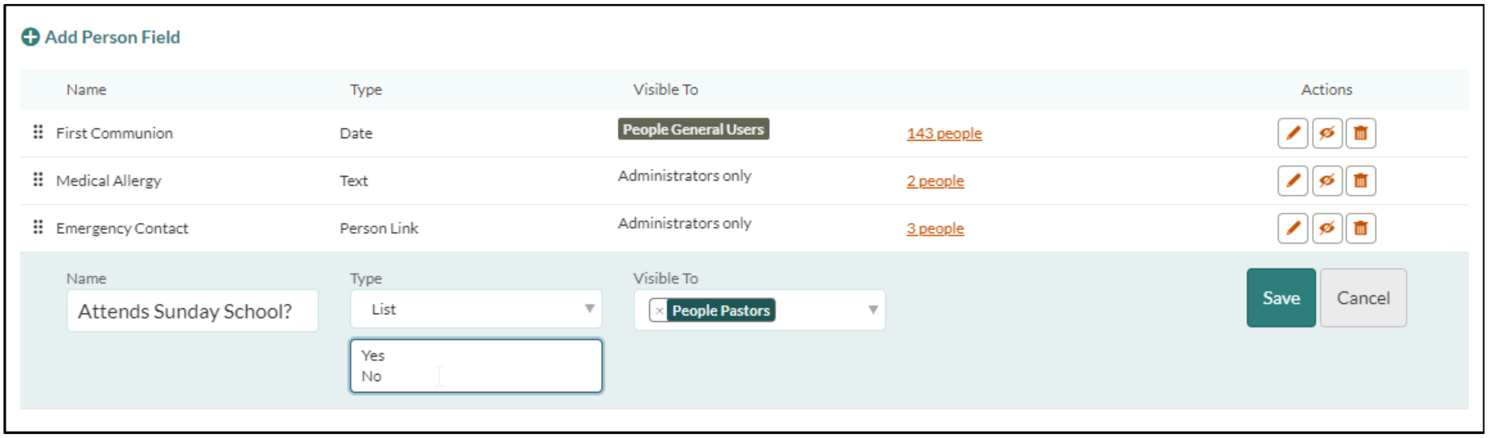
1. Click on the gear icon to open your Settings view.

2. On the navigation menu on the left, select “Custom Fields” under the People section.

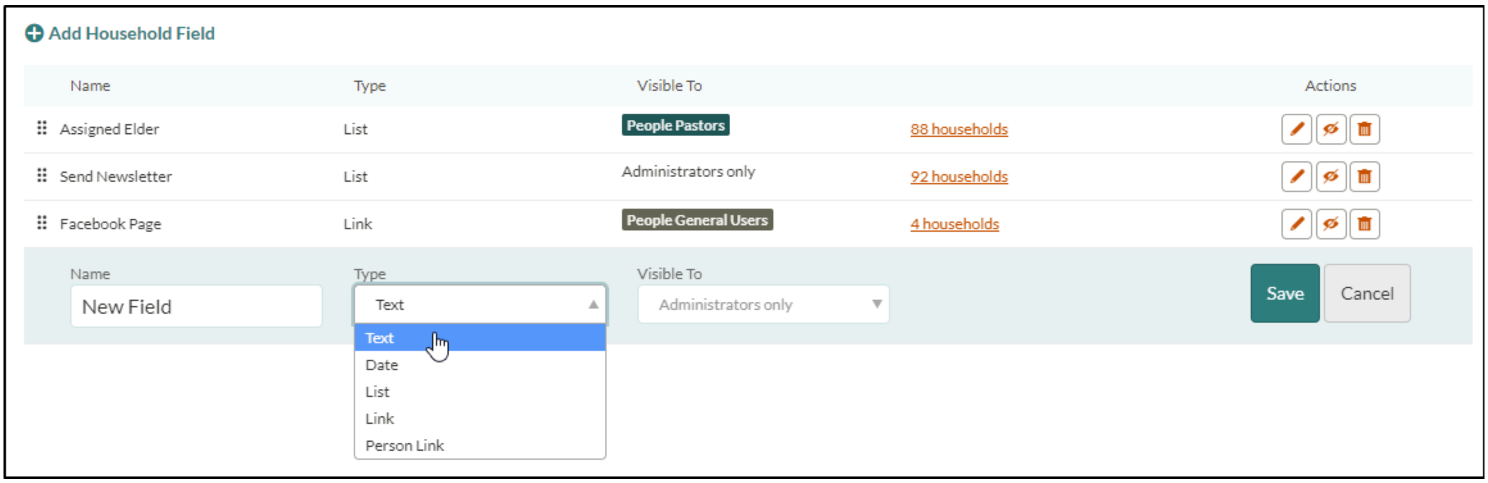


3. Click to add a field depending on what record and view you would like this custom field to appear.

- Add Person Field - Use this option to add a field to individual profiles as well as display on the Individuals mode of the People view. Examples of person fields would be School or Occupation.



- Add Household Field - Use this option to add a field to household profiles as well as display on the Households mode of the People view. Examples of household fields would be a newsletter or mailing list.



4. Enter 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, link, or person 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.

- 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 would like to add using this type of field.
- 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 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.
- Person Link - This can be used to link one member to another person record within the system (e.g. linking prayer partners, emergency contact, etc).

6. Select the visibility for your custom field. Visibility for custom fields is tied to People roles you create for logins.

7. Click “Save” to save your changes.

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.

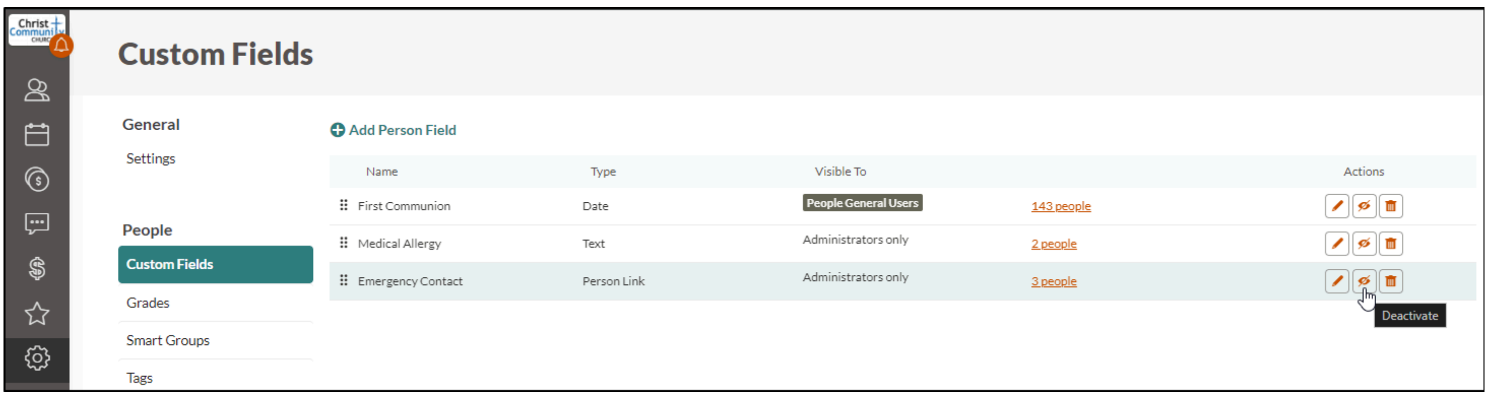
To add a new custom field,

1. Click on the gear icon to open your Settings view.

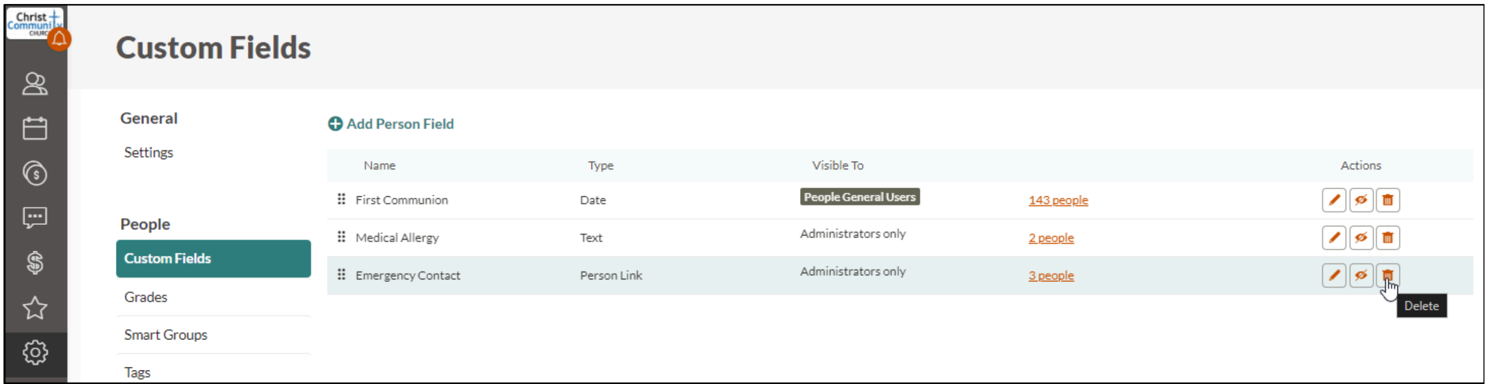
2. On the navigation menu on the left, select "Custom Fields" under the People section.

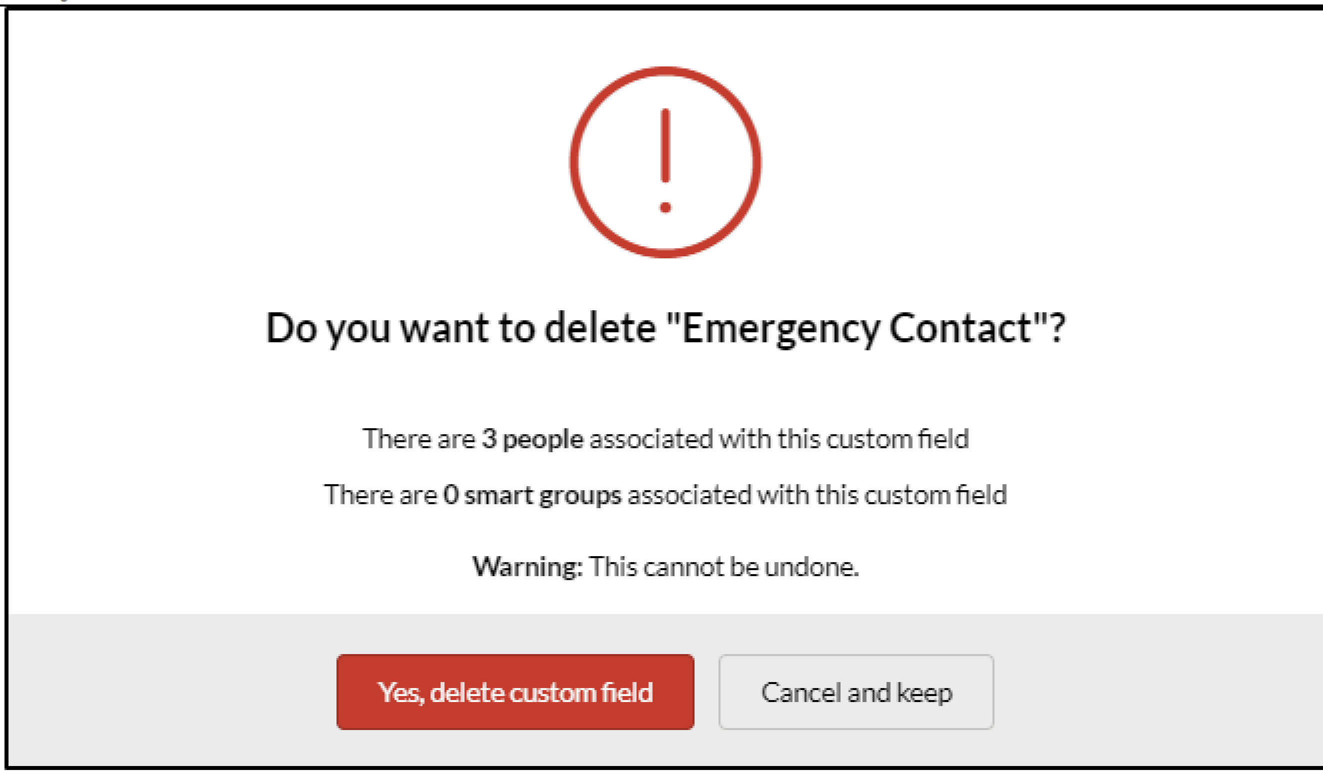
3. Use the icons on the far right to hide or delete .

- To hide the field but still retain its information, click the eye icon to deactivate it. Clicking the eye again will reactivate it and make it visible from the profile view.



- To remove the field permanently, click the trash can icon to delete all information related to this field.
  - If the field has people or smart groups associated with it, you will be prompted with a confirmation window. To go through with the deletion, click "Yes, delete custom field".


Custom Fields
General
Settings
People
Custom Fields
Grades
Smart Groups
Tags
Add Person Field
Name
Type
Visible To
Actions
First Communion
Date
People General Users
143 people
Medical Allergy
Text
Administrators only
2 people
Emergency Contact
Person Link
Administrators only
3 people
Delete


Do you want to delete "Emergency Contact"?
There are 3 people associated with this custom field
There are 0 smart groups associated with this custom field
Warning: This cannot be undone.
Yes, delete custom field
Cancel and keep

Navigating the Grades view

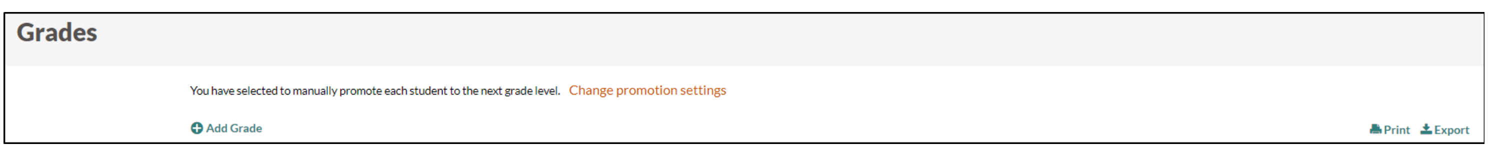
When adding new people to a database, there may be some within student-age. A grade field is available if a church administration wants to track grades for these students.

The Grades field allows users to add and edit grades for those currently in school.

Action buttons

Like other views, the Grades view has action buttons for specific tasks.

- Change promotion settings/date - At the top of the view, there will be a statement on whether the site is set to promote grades automatically on a specified date or not. Clicking the link that follows the statement will take users to General Settings, where a promotion date can be chosen or changed.
- Add Grade - This option will create a new entry for a grade that can be added to a person's record.
- Print - This option allows users to print a list of grades directly from your browser.
- Export - This option will export all grades and number of students in each grade currently into a CSV file that users can edit and share.



Grade List

All Smart Groups and their details are listed in the view. The order here determines the promotion order.

- Name - Displays the name of the grade.
- People - The number of student records currently in the grade. Clicking the number link will take users to the People view listing those in the grade.

Actions for Grades

- Rearrange Grade order - By clicking and dragging the left side of a grade, users can move grades up and down.
- Edit Grade - The pencil icon to the far right of the grade will open its name for editing.
- Delete Grade - The trash can icon to the far right of the grade will remove it from the list.

Name	Number of Students	Actions
Preschool 0	0 students	
Preschool 1	1 student	
Preschool 2	1 student	
Preschool 3	0 students	
Preschool 4	1 student	
Kindergarten	3 students	
First Grade	2 students	
Second Grade	11 students	
Third Grade	5 students	
Fourth Grade	8 students	
Fifth Grade	2 students	
Sixth Grade	3 students	

Adding Grades

In addition to existing grade options, users can create and customize their grade selections for student records to fit their church's needs.

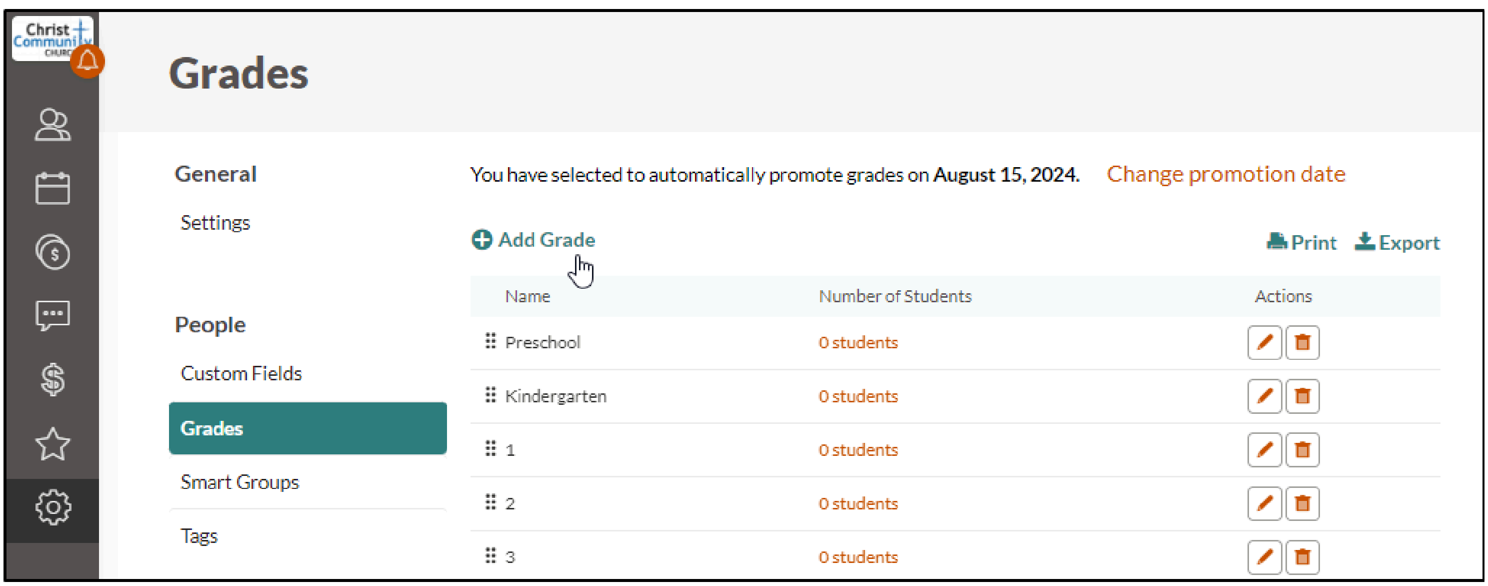
This article is regarding creating new grade options to assign to person records. If you are looking to assign an existing grade to a person record, please visit our article here.

If you are interested in setting up automatic promotion for grades at a specific date each year, please visit our article here.

To add a new grade to your list,

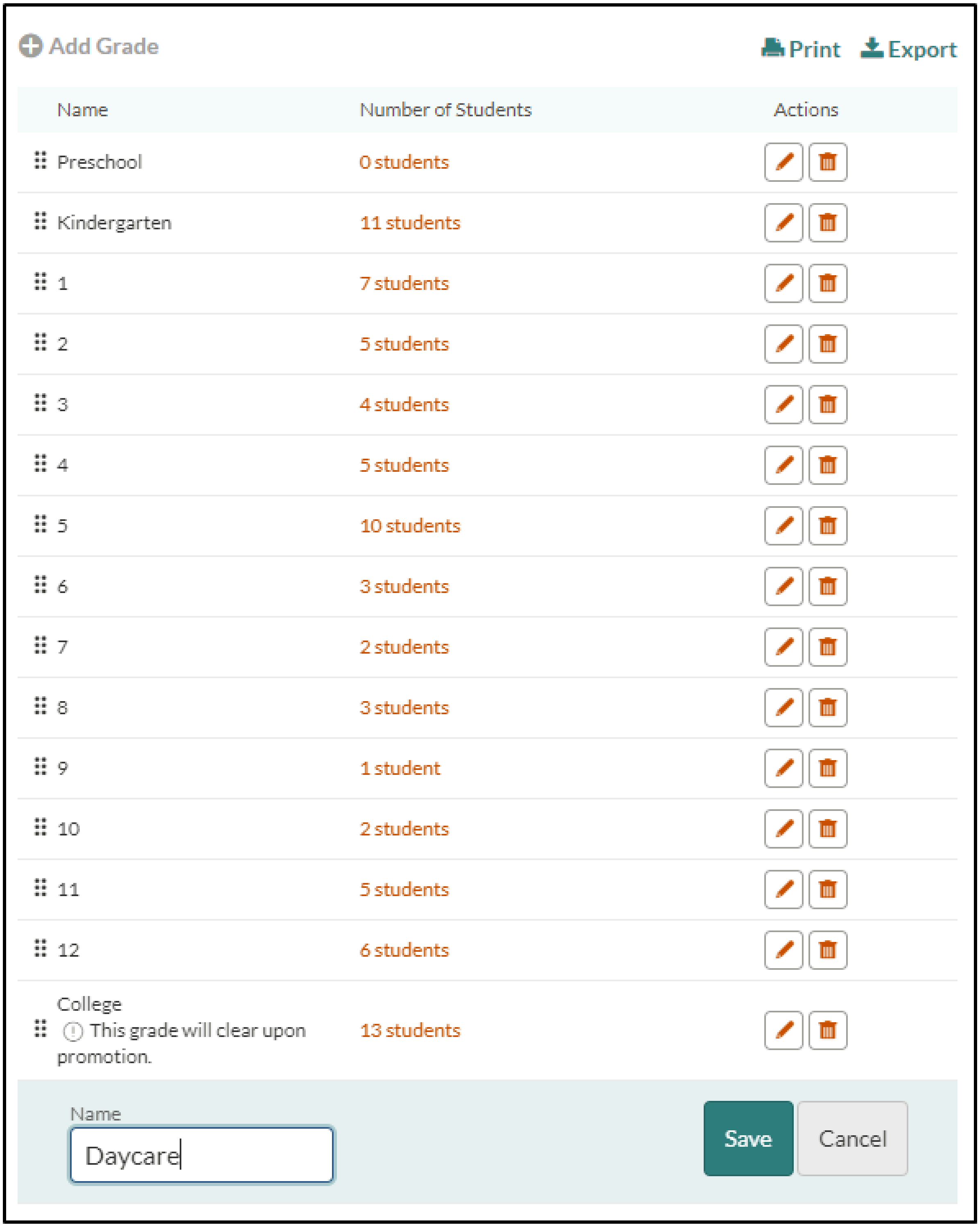
1. Click on the gear icon to open your Settings view.

2. On the navigation menu on the left, select “Grades” under the People section.

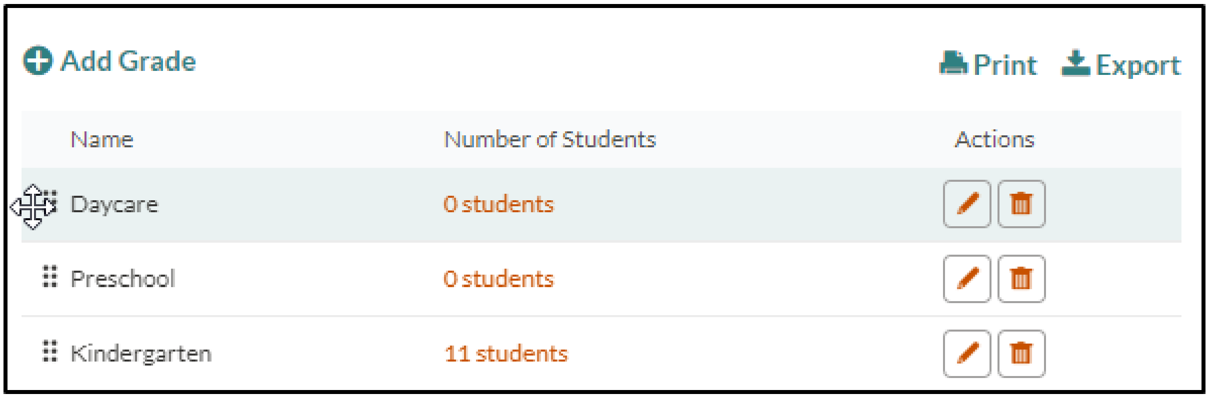


3. Click to “Add Grade” to create a new grade. The new entry will appear last in your list.

4. Type in the name of the grade or range you want to add in the text box and click the "Save" button.



5. To move the grade to its correct position, click the icon to the left of the name and drag the grade to its correct position. Release the mouse to lock in the grade's position. Changes will be automatically saved.



Note: The order on the Grades view determines the promotion order and the final entry in the grade list will be cleared out upon promoting your grades.

Automatically Promoting Grades

Each year, your school-age members will need to be advanced to the next grade. Church360° Members refers to this process as promoting students. You can promote students at any time by changing the grade on each person's profile. However, to make this process more efficient, you can instead set this process to occur automatically each year.

> Students will be promoted through grades in the order the grades are listed in the Grades view, from top to bottom. For this reason, it's important that the grades are ordered correctly before the automatic promotion occurs, otherwise students will be moved to the wrong grade. If a student is in the last grade listed, their grade will be listed as "none" in their profile.

Note

Only users who can modify account settings can schedule the promotion, and the feature is disabled by default. There is no automated process to demote students.

1. Click on the gear icon and select "Account Settings."
2. Under the Grades section, check the box "Automatically promote grade levels" and choose the date on which students will be promoted to the next grade. If you are wanting to promote students as soon as possible, set the date for the following day.
3. Click the "Save" button located at the bottom of your screen.

Note

Once this utility is set up, the next time the update is set to run will be displayed. The automatic promotion occurs at 12:30 a.m. (UTC) on the date you specify.

Grades

- [x] Automatically promote grade levels

By clicking this box you certify that you would like to automatically promote all children up one grade level on the date specified below.

Automatic promotion date

August ▾	21 ▾

Next update August 21, 2022

Editing Grades

When a grade list needs restructuring or a grade is entered incorrectly, users can update grade options from the Grades view. If changes are made, it may be necessary to reorder them afterwards.

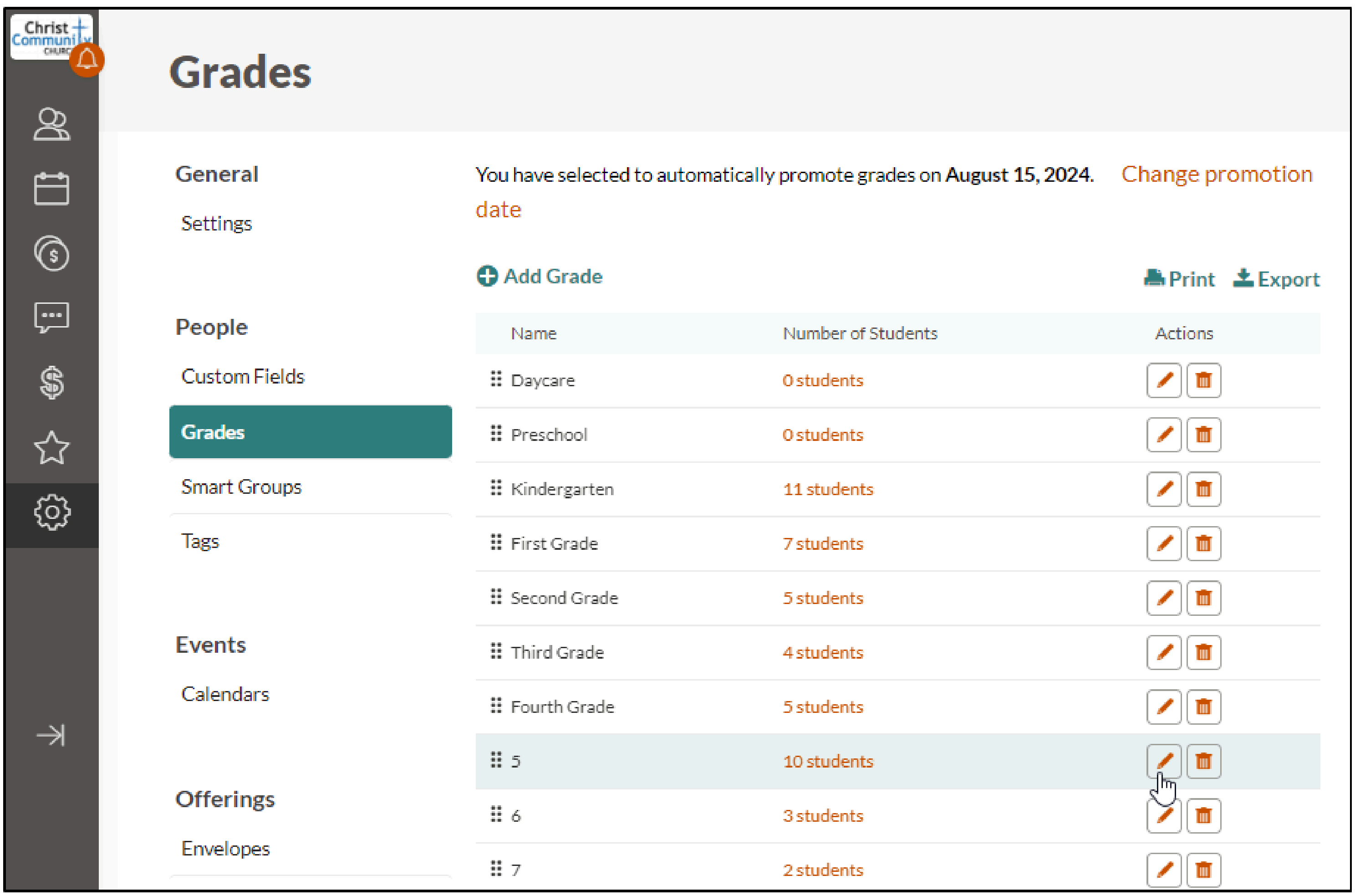
This article is regarding editing grade options to assign to person records. If you are looking to assign an existing grade to a person record, please visit our article here.

To edit a grade in your list,

1. Click on the gear icon to open your Settings view.

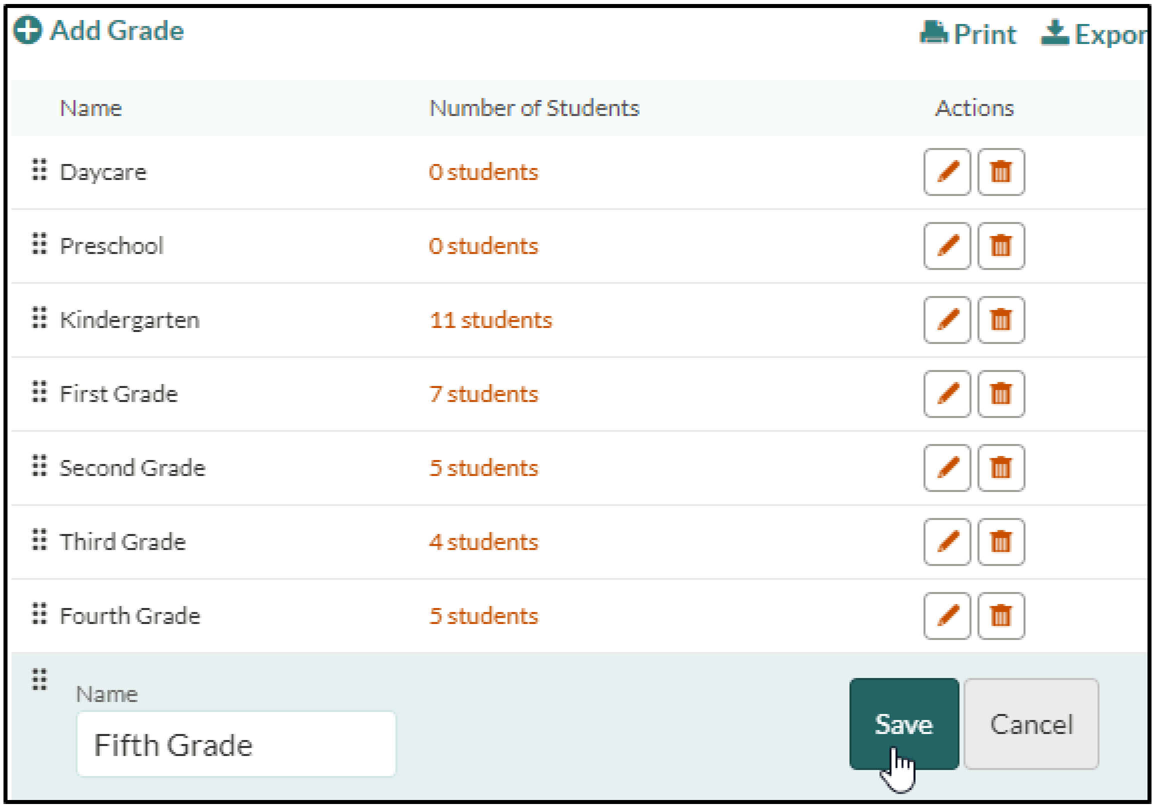
2. On the navigation menu on the left, select "Grades" under the People section.

3. To rename a grade, click on the pencil icon to enable editing.

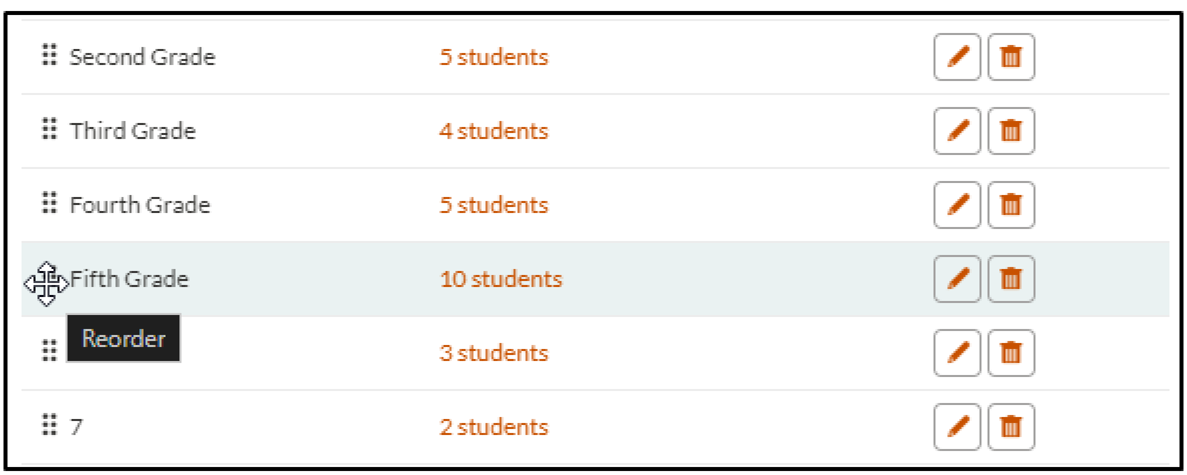


4. Re-enter the grade's name as needed.

5. Click the “Save” button to save your changes.



6. To move the grade to its correct position, click the icon to the left of the name and drag the grade to its correct position. Release the mouse to lock in the grade’s position. Your changes will be automatically saved.



Note: The order on the Grades view determines the promotion order and the final entry in the grade list will be cleared out upon promoting your grades.

Deleting Grades

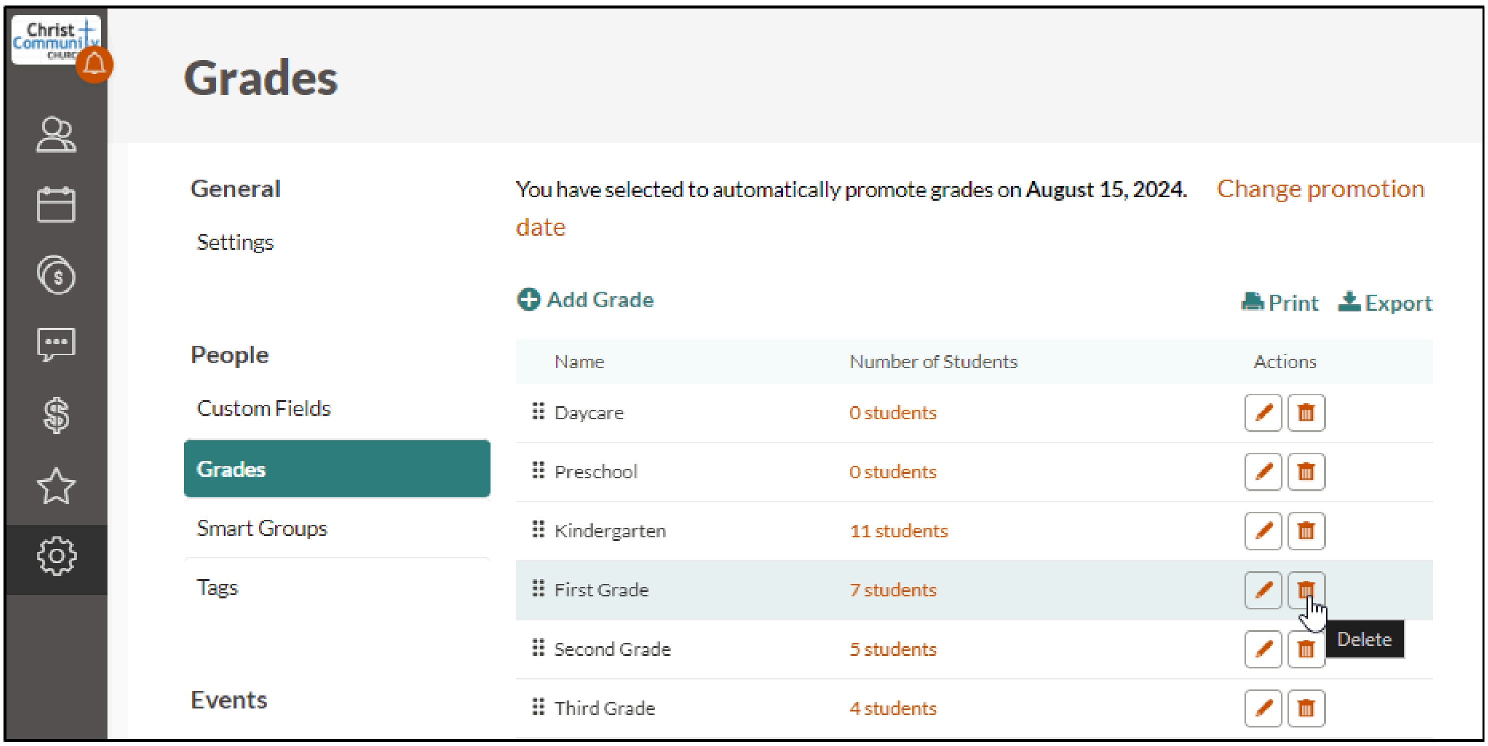
If there are extraneous grades in the Grades view, they can be deleted.

To delete a grade from your list,

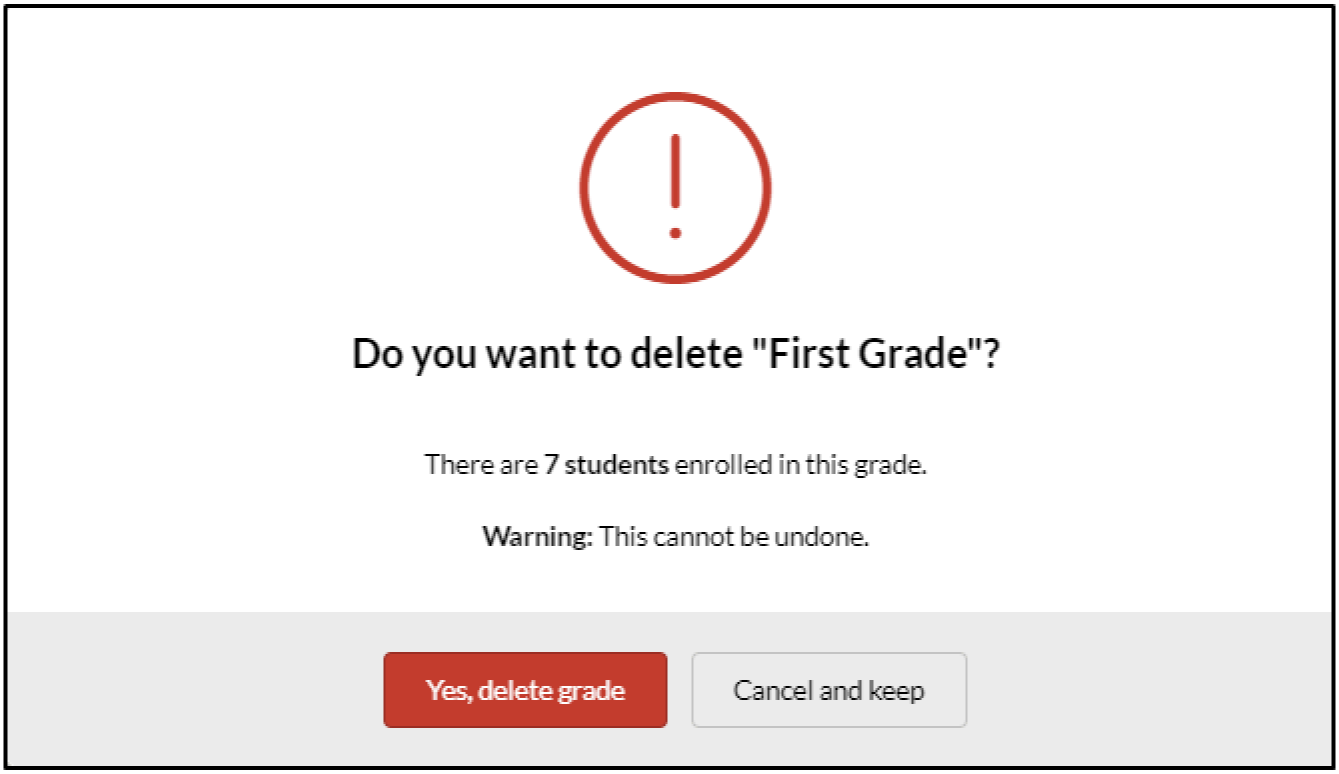
1. Click on the gear icon to open your Settings view.

2. On the navigation menu on the left, select “Grades” under the People section.

3. Click on the trash can icon to the far right of the grade you wish to delete.



- If there are no current students enrolled for this grade, the grade will disappear.
- If there are current students in the chosen grade, a pop-up window will appear asking if you want to delete the grade and clear the grade field for those students. Click the "Yes, delete grade" button to finalize the deletion.



Note: Deleting a grade cannot be undone. All students with this grade will be listed as having no grade.

Navigating the Smart Groups view

To display person records according to a user's needs, numerous views and reports that can be filtered based on various fields related to a person's individual or household record. These sets of criteria can then be saved for future use as a Smart Group. From here, users can select default or saved Smart Groups to select a subsection of their congregation for various purposes.

Smart Groups can be created and saved from different views where they can then be managed further as needed.

Action buttons

Like other views, the Smart Groups view has action buttons for specific tasks.

- Add Group - This option will create a new entry for a Smart Group where you can then add and choose different traits to determine who should be included in the group.
- Print - This option allows users to print a list of Smart Groups directly from your browser.
- Export - This option will export all Smart Groups, their description, creator, and number of people in the group currently into a CSV file that users can edit and share.

Smart Group List

All Smart Groups and their details are listed in the view.

- Name - Displays the name of the Smart Group.
- Description - Displays the default or custom description for the Smart Group.
- Creator - Displays the login that originally created and saved the Smart Group.
- People - The number of person records that currently fulfill all of the Smart Group's criteria. Clicking the number link will take users to the People view listing those in the Smart Group.

Actions for Smart Groups

- Edit Smart Group - The pencil icon to the far right of a Smart Group will open it for editing.
- Deactivate Smart Group - The eye icon to the far right of a Smart Group will hide it from views. Clicking on the eye icon again will reactivate it. Default and autogenerated Smart Groups cannot be deactivated.
- Delete Smart Group - The trash can icon to the far right of the Smart Group will remove it from the list.

Name	Description	Creator	People	Actions
Married People	who are Married		88	
Members	who are Living and who are Members now		195	
Delinquents	who are Members now and who have not Attended Worship in the last 4 weeks		198	
Opted In to Text Messages	who have a Cell Number and who are Opted In to receive text messages		0	
Active Members	who are Living, who are Members now , and whose Tags do not contain Inactive		161	
Mailing List	who are Living, who are Members now , and whose Active Address is filled in		194	

Creating Smart Groups

Church360° Members includes the capability to filter and organize your views and reports using traits found in person records using a feature called Smart Groups.

Smart Groups cluster people together based on a certain set of criteria that you determine that you can then save for future use.

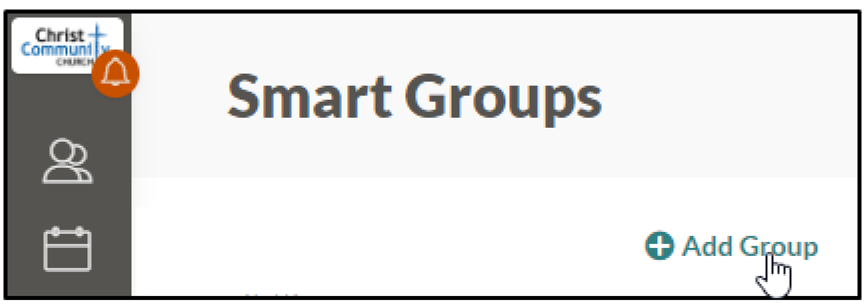
You can create these groups either from the Smart Group page, which lists all of the built-in and created Smart Groups for your site, or directly from the People View.

To create a Smart Group from the Smart Group view,

1. Click on the gear icon to open your Settings view.

2. On the navigation menu on the left, select "Smart Groups" under the People section.

3. Click to "Add Group" to create a new Smart Group. The new entry will appear last in your list.



4. Type in the name for your group.

5. Click "Add Trait" to add criterium to your group and use the drop-down menus to customize. Continue to add traits as you need.

6. If you'd like, you can also add a description to your Smart Group, up to 120 characters.

7. Once your Smart Group is set up, click "Save" to save your entry.

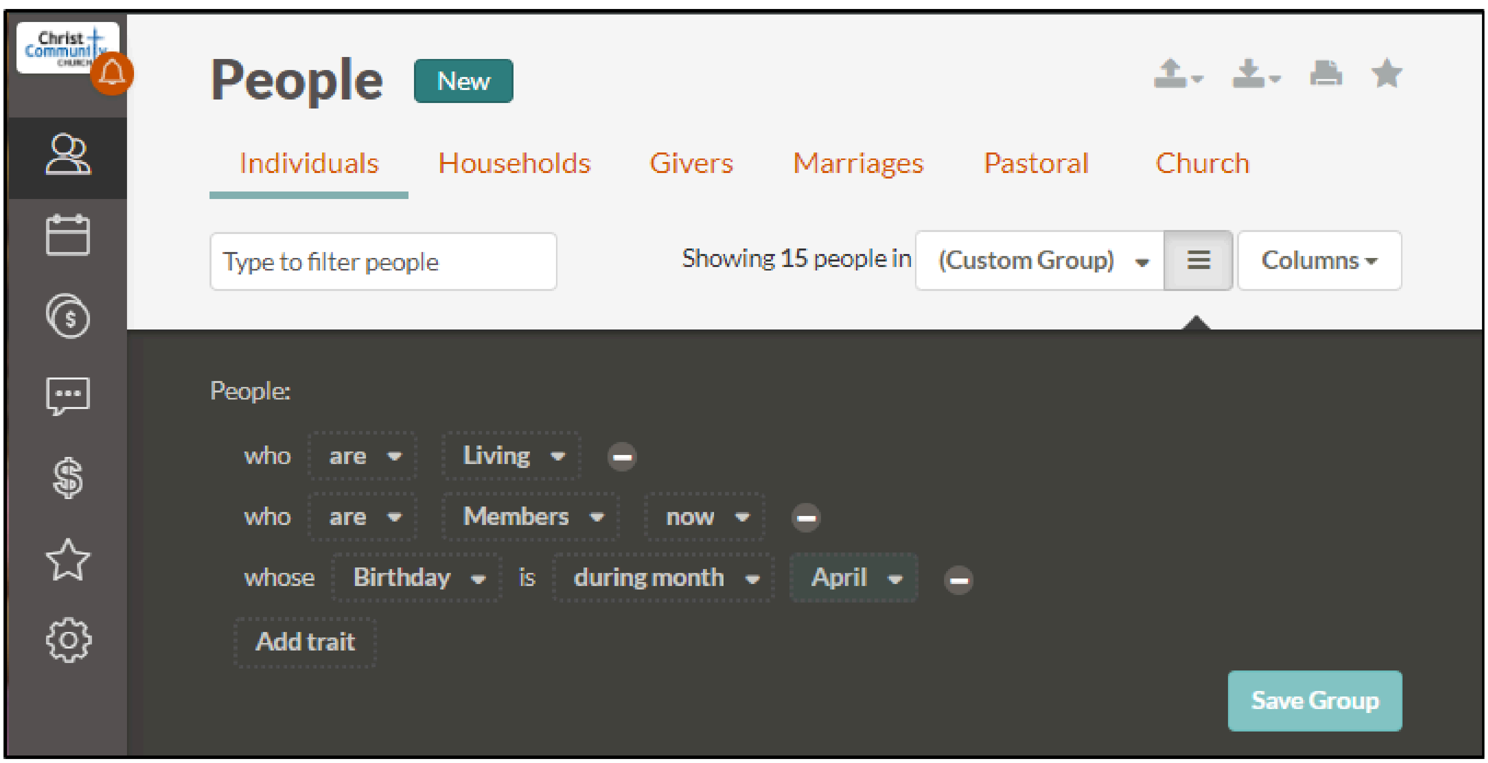
To create a Smart Group from the People view,

1. Click on the gear icon to go to People.

2. Go to the any of the first four People views.

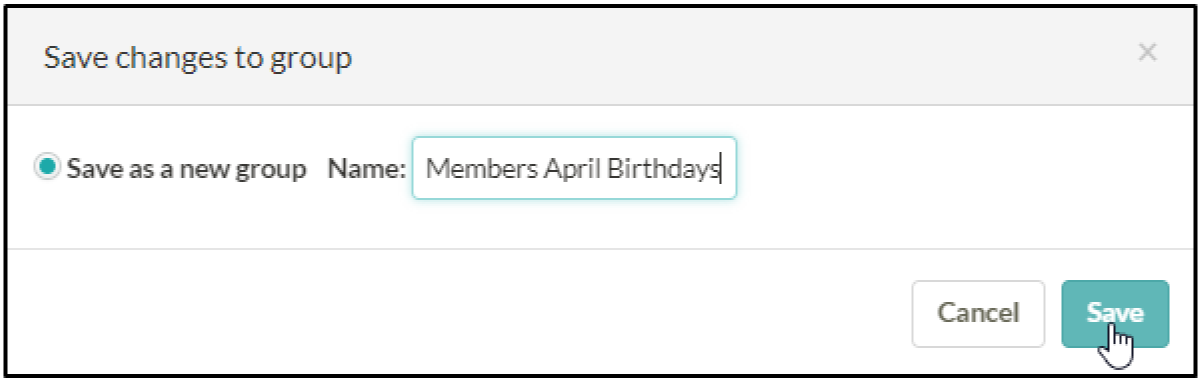
3. Expand the Smart Groups drawer by clicking the icon with three lines between the Smart Group and Column drop-down lists.

4. In the dark area that shows, click "Add trait" to add parameters to filter your people list and use the drop-down menus to customize. Continue to add traits as you need.



5. Once your Smart Group is set up, click "Save Group" to save your entry.

6. Type in the name of your new group where it says "New Group".


Save changes to group
×
Save as a new group
Name:
Members April Birthdays
Cancel
Save

Understanding Smart Group 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.

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 event in their life

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: Filters 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 to 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

If you find you need to update a Smart Group or create a new Smart Group based on an existing group, users can edit and resave their criteria as needed from both the Smart Group view and the People view.

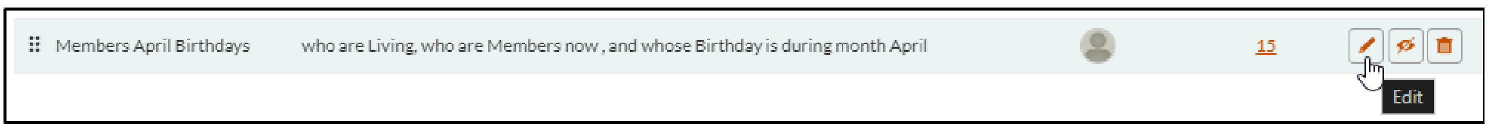
To edit a Smart Group from the Smart Group view,

1. Click on the gear icon to open your Settings view.

2. On the navigation menu on the left, select “Smart Groups” under the People section.

3. Click on the pencil icon to the right of the Smart Group to enable editing.

4. Add or edit the name, traits, or description of the Smart Group as needed and click "Save" to save your changes.

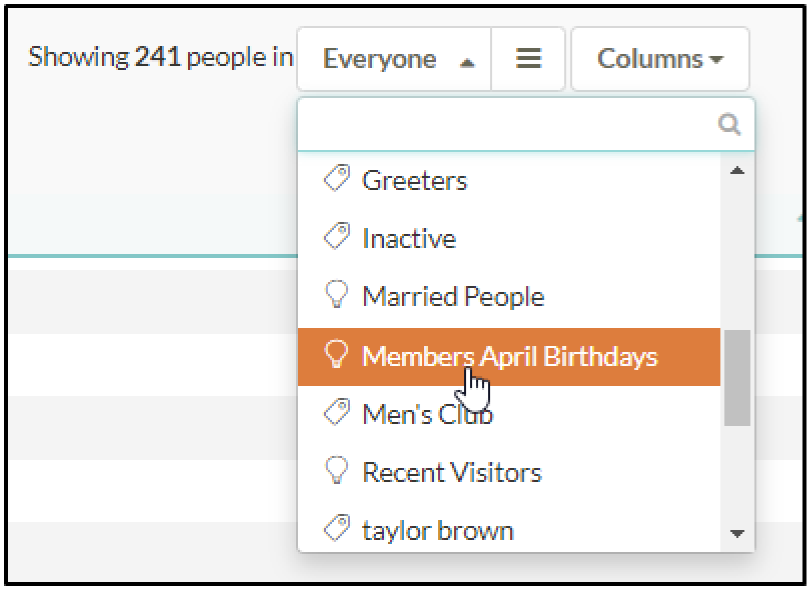


To edit a Smart Group from the People view,

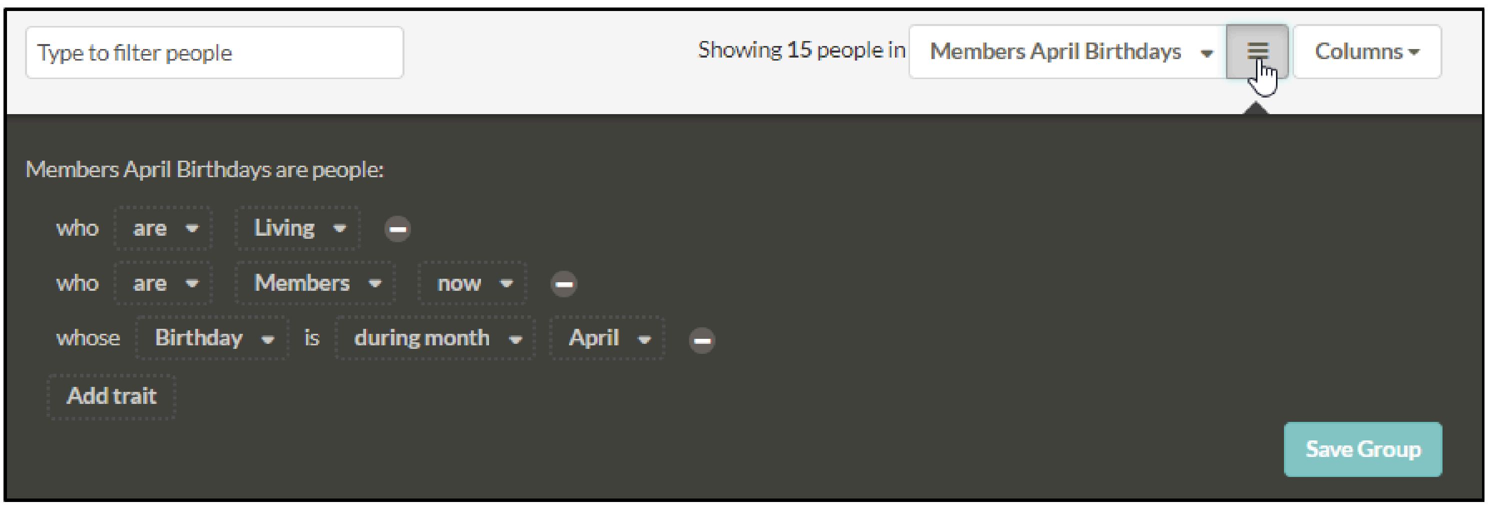
1. Click on the gear icon to go to People.

2. Go to the any of the first four People views.

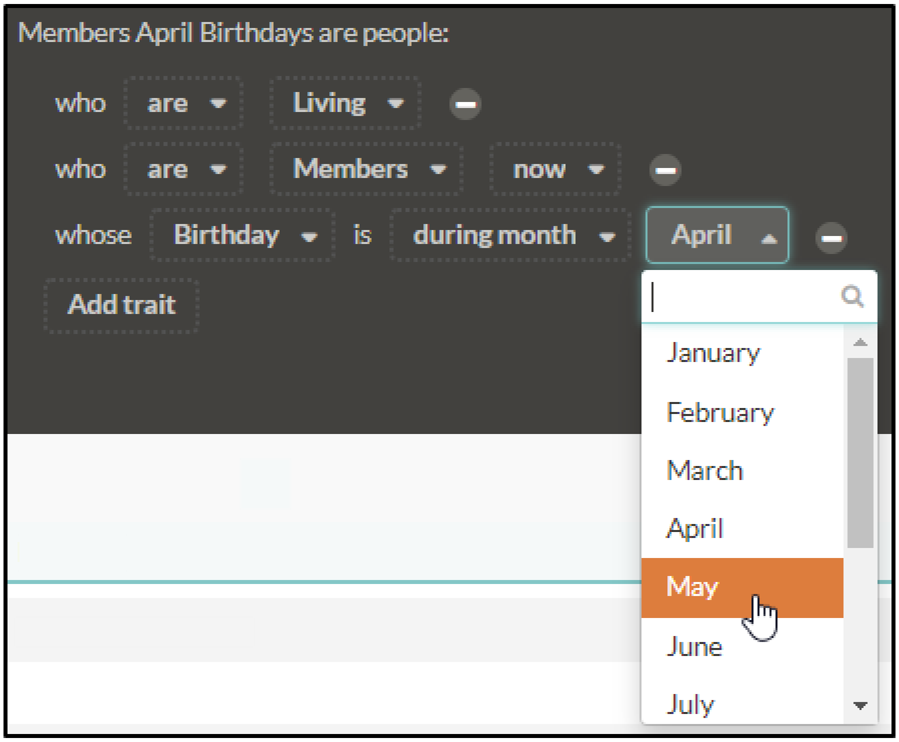
3. Use the first drop-down menu to the right to select the Smart Group you want to edit. Smart Groups are marked with a lightbulb icon in the list.



4. Expand the Smart Groups drawer by clicking the icon with three lines between the Smart Group and Column drop-down lists.

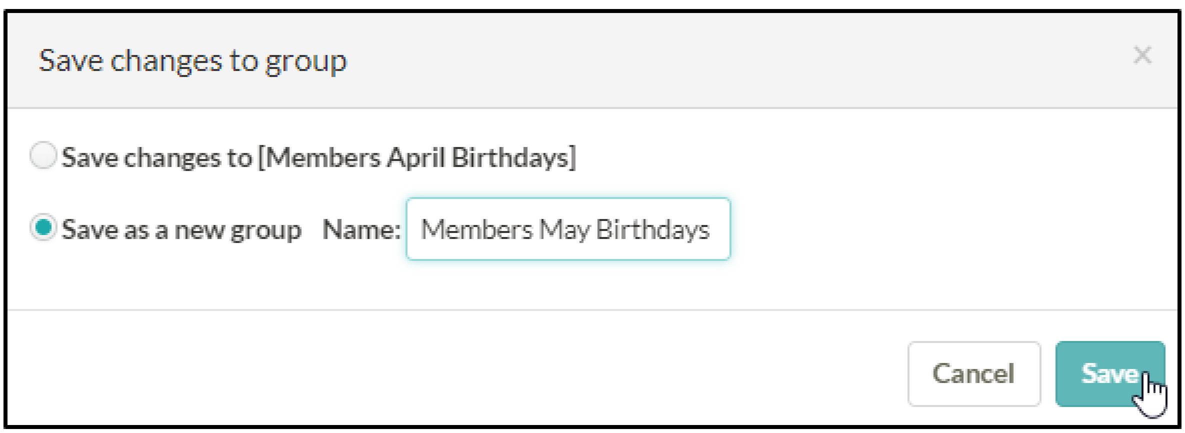


4. In the dark area that shows, edit traits as needed.



5. Click "Save Group" to save your changes. If the Smart Group has previously been saved, a prompt window will appear.

6. To save changes to the existing group, choose the first option. To create a new Smart Group, choose the second option and add a name for the new group. Click "Save" to save your selection.



Deactivating or Deleting Smart Groups

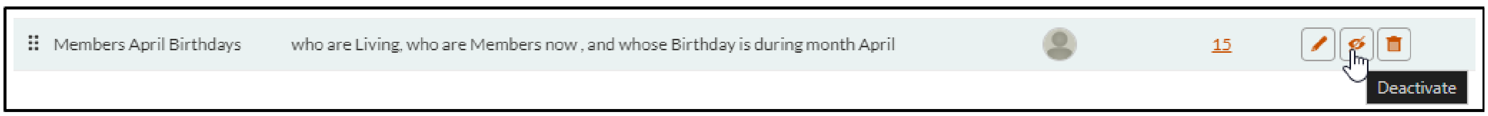
If a Smart Group is no longer in use, you may wish to deactivate it temporarily or delete it entirely from your list of available Smart Groups.

To remove a Smart Group,

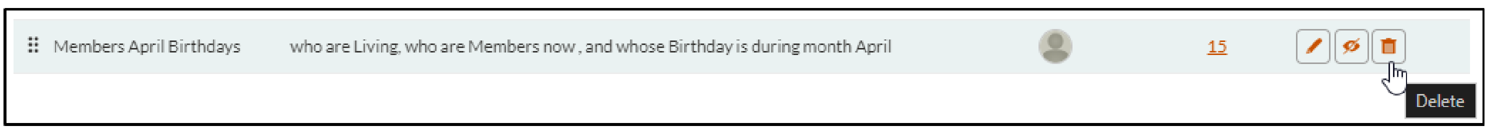
1. Click on the gear icon to open your Settings view.

2. On the navigation menu on the left, select “Smart Groups” under the People section.

- Click on the eye icon to the far right to deactivate the Smart Group and hide it from view. Click on the eye again to reactivate it.



- Click on the trash can icon to delete the Smart Group entirely and remove it as an option for views.



Church360° Members Help Center › Settings › People Settings

Printing or Exporting the Smart Group list

Printing your Smart Groups list can be helpful when cleaning up any groups that might no longer be needed.

To print a Smart Group list,

1. Click on the gear icon to open your Settings view.

2. On the navigation menu on the left, select "Smart Groups" under the People section.

3. At the upper right of the view, click to print or export the list.

- Click "Print" to open the list in a print preview.
- Click "Export" to export the list into a CSV file.

Navigating the Tags view

In addition to Smart Groups and Custom Fields, users can use the concept of tagging to specify different designations, preferences, or additional information about an individual that other fields do not cover.

Tagging is a quick manual process that can be done while inside of a person's record or in bulk from the People view and can then be used to help filter or report on those with a specific tag.

Action buttons

Like other views, the Tags view has action buttons for specific tasks.

Add Tag - This option allows a user to enter in a tag name, select a color for the tag, and click "Add Tag" to add the entry to the list of Tags in the system.

Download - This option will export all Tags, and the number of people who currently have the tag to either a CSV or Excel file that users can edit and share.

Print - This option allows users to print a list of Tags directly from your browser.

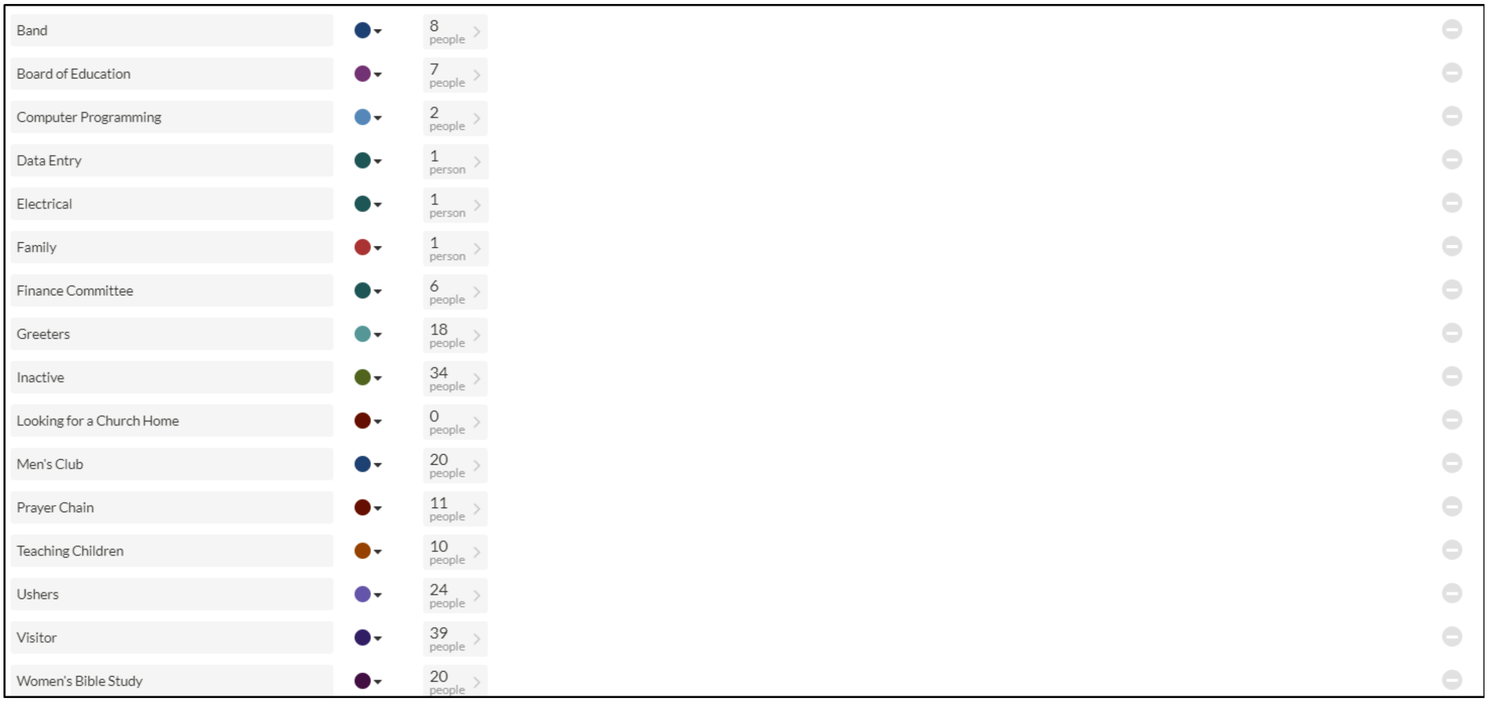
Tag List

All Tags and their details are listed in the view.

- Name - Displays the name of the Tag.
- Color - Displays the color the Tag shows on the People view or Individual profile.
- People - The number of person records that currently have the Tag on their person record. Clicking the number link will take users to the People view listing those with the Tag.

Actions for Tags

- Edit Tag - Clicking a tag's row will open it for editing.
- Delete Tag - Clicking the grey minus button to the far right of the Tag (and then clicking "Delete") will remove it from the list and any person records that had that Tag added to them.



Adding Tags from the Tags Page

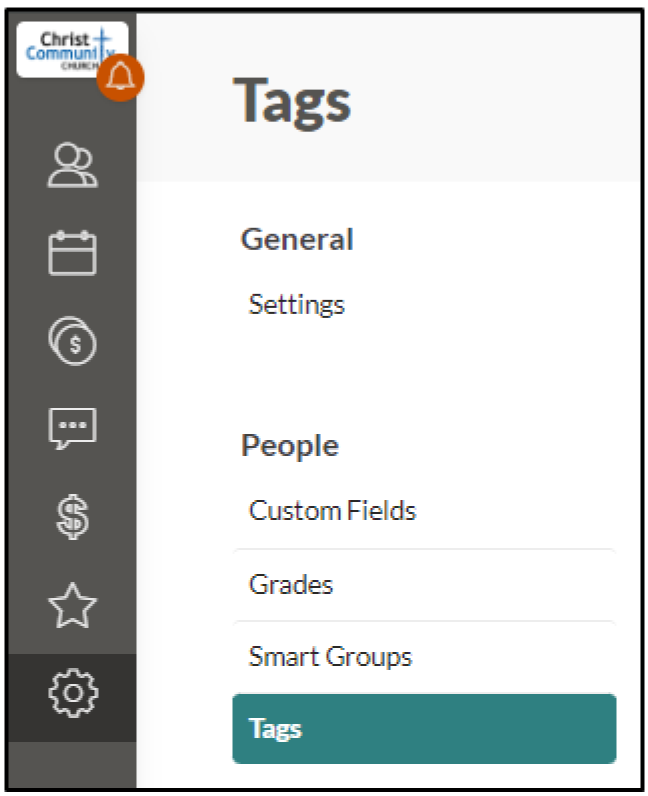
As opposed to selecting and grouping person records based on set criteria and fields, users can also manually label records to add a designation that can be used for filtering and grouping purposes.

In addition to adding tags directly to records from a profile or the People view, users can also create tags initially as an option that can be added to records later.

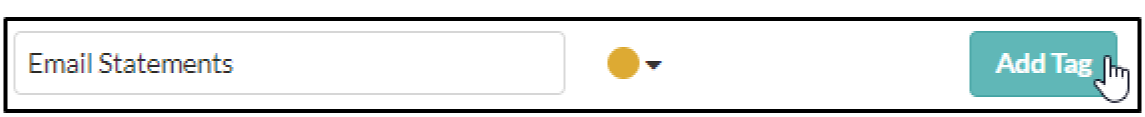
To add a new tag option in advance,

1. Click on the gear icon to open your Settings view.

2. On the navigation menu on the left, select "Tags" under the People section.



3. On the top line, enter in the tag name and select a color for the tag. Click "Add Tag" to add the new entry.



Editing Tags

From the Tags page, you can edit the name and color of Tags for easier organization or visibility.

To edit an existing tag,

1. Click on the gear icon to open your Settings view.

2. On the navigation menu on the left, select "Tags" under the People section.

3. Find and click on the tag name to open it for editing.

4. Make changes as needed and click "Save" when finished.

Deleting Tags

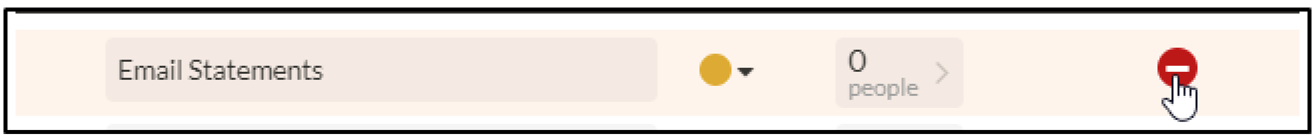
When cleaning up data, tags that are no longer used can be deleted from your Tags list to keep it accurate and organized.

To delete a tag,

1. Click on the gear icon to open your Settings view.

2. On the navigation menu on the left, select "Tags" under the People section.

3. Click on the gray minus sign to the far right of the tag name.



4. Click "Delete" to confirm the deletion of the tag and remove it from all person and household records. This cannot be undone.

Printing the Tag list

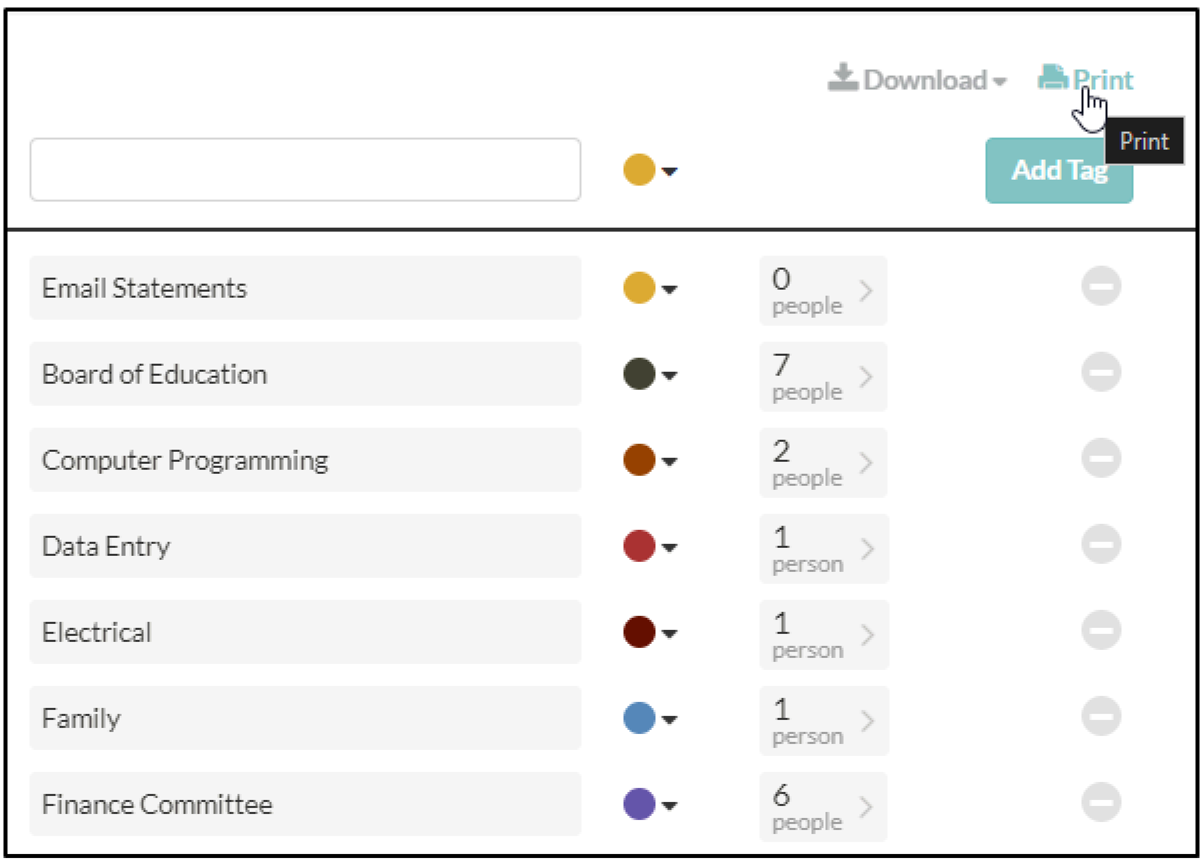
Printing a list of tags and the number of people using them can give insights to different designations found in your database.

To print a tag list,

1. Click on the gear icon to open your Settings view.

2. On the navigation menu on the left, select “Tags” under the People section.

3. At the upper right of the view, click “Print” to open a print preview in a new tab. Use CTRL+P or click “File” and “Print” to print from the browser.



Exporting Tags List to CSV or Excel

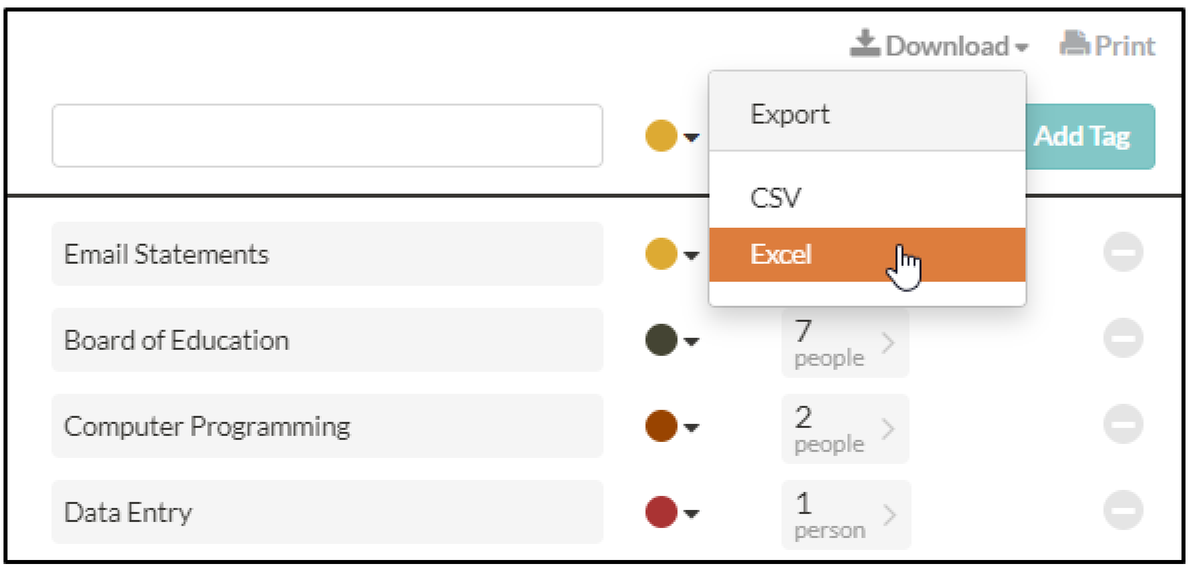
By exporting a list of tags and the number of people using them, users can review whether some tags need to be cleaned up.

To export a tag list,

1. Click on the gear icon to open your Settings view.

2. On the navigation menu on the left, select "Tags" under the People section.

3. At the upper right of the view, click "Download" to export to CSV or Excel. Your list will automatically generate and download.



Navigating the Logins view

The Logins view displays all users with access to the Church360° Members site, their login email, and their assigned Roles.

Action buttons

Like other views, the Logins view has action buttons for specific tasks.

- Add Login - This button will open an entry to create a new user account for the site.
- Print - This option allows users to print a list of all users of the site and their login information directly from the browser.
- Export - This action will export all Login information into a CSV file that you can edit and share.

Login List

Under the Logins heading and Action buttons, all current Logins are displayed with three columns.

- Name - Displays the name of the person record of the user.
- Email - Displays the email address the user uses to log into the site. This can be changed in User Settings. If the email columns displays a pending message, the user has not yet finished creating their account.
- Roles - Displays all selected Roles for the user that determine what they can access and manage. A user can have multiple Roles.

Actions for Logins

- Inspect Login - The i icon to the far right of the login record can be clicked to display the user's compiled permissions on what they can access and manage.

- Edit Login - The pencil icon to the far right of a login will open it for editing. Users can reassign the Login or change their roles.
- Delete Login - The trash can icon to the far right of a login will remove it so that they can no longer log into the site.
- Expire Login - The lock icon to the far right of a login will expire the login's password, forcing the user to reset their password the next time they log in.

Name	Email	Roles	Action
Taylor Brown	taylor.brown@cph.org *Last sign in at:* Dec 4, 2024 1:10 PM *Password expires at:* Dec 13, 2025 11:07 AM	People People Administrators Events Events Administrators Offerings Offerings Administrators Communications Communications Administrators Ledger Ledger Administrator	
Kimberly Moon	kimberly.moon@cph.org *Last sign in at:* Aug 19, 2024 1:55 PM *Password expires at:* Dec 13, 2025 11:07 AM	People People Volunteers Events Events General Users Offerings Offerings Administrators Communications *No access* Ledger Create Checks Create payments	

Adding Logins

To access your Church360° site, each user will need their own login with assigned roles. And as staff and volunteers change within your church, these logins will need to be managed to make sure access to your congregation's records are restricted to only those who need it.

It is recommended to review or create roles for the logins you are looking to create before inviting them to set up their credentials.

To add a new login for your site,

1. Click on the gear icon to open your Settings view.

2. On the navigation menu on the left, select "Logins" under the Admin section.

3. Click to "Add login" to open a new entry.

4. Use the drop-down field to select the person record whose email addresses will be used for invitations.

- If an individual doesn't have at least one personal or work email on their record, they will be denoted as having no email. Users will need to go into the record, add or edit an email address as either personal or work and try creating a login again.

5. Click the roles to assign to the login. A login can be given multiple roles to allow for combined permissions.

- If a person is given an administrator role, they have all permissions related to that area of the software and do not need any additional roles.
- If a person is given no roles for an area of software, they will not have that area available to them on the navigation bar.

6. Click "Save" to confirm the login's settings and automatically send out an invitation to all personal and work email addresses found on their person record.

- Until the invitee opens the invitation message and finishes creating an account and password, they will be marked as "Pending invite" and not display an email address yet.
- If multiple email addresses are sent an invitation, the email address that is used to create the account and password will be the username for logging into the site.
- If a user needs to update their email address, they can do so in User Settings.

Editing a Login's Roles

If a person with a login has a position change, administrators may need to add or remove certain roles attached to their login for accessibility and security purposes.

To edit an existing login's roles,

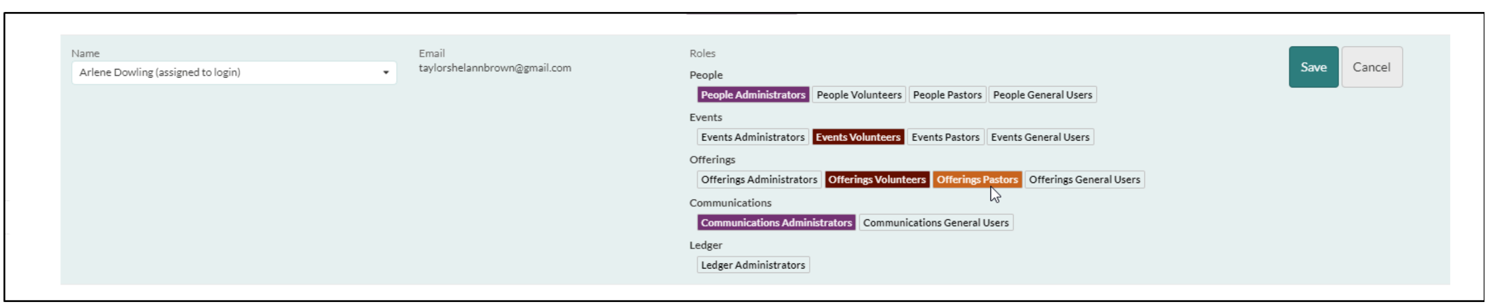
1. Click on the gear icon to open your Settings view.

2. On the navigation menu on the left, select “Logins” under the Admin section.

3. Find the login you want to change and click the pencil icon to the right to open it for editing.

4. Select and deselect roles as needed.

- If a person is given an administrator role, they have all permissions related to that area of the software and do not need any additional roles.
- If a person is given no roles for an area of software, they will not have that area available to them on the navigation bar.



5. Click "Save" to save your changes.

Reassigning Logins

At times, you may need to provide a new person a login with an email address that is already in use.

For example, if you get a new church secretary, and the login that the previous secretary was using for their login was a generic secretary email account for your church, you may want to be able to use that email address again for your new secretary.

For cases like this, users can reassign a login to a new person record to assign the same login email and password (though it's recommended this is reset when changing personale), without having to delete the login and reinvite someone manually.

To reassign a login,

1. Click on the gear icon to open your Settings view.

2. On the navigation menu on the left, select "Logins" under the Admin section.

3. Find the login you want to change and click the pencil icon to the right to open it for editing.

4. Use the drop-down field to choose a different person record.

5. Click "Save" to save your changes. Whenever the account is signed into next, it will be associated with the new person you selected.


Name
Arlene Dowling (assigned to login)
C Chesterfield
No Email
Brian Chung
No Email
Lina Chung
No Email
Molly Chung
Ben Clayton
No Email
Email
taylorshelannbrown@gmail.com
Roles
People
People Administrators
People Volunteers
People Pastors
People General Users
Events
Events Administrators
Events Volunteers
Events Pastors
Events General Users
Offerings
Offerings Administrators
Offerings Volunteers
Offerings Pastors
Offerings General Users
Communications
Communications Administrators
Communications General Users
Ledger
Ledger Administrators
Save
Cancel

Deleting Logins

If a user no longer wants or needs access to your Church360° site, deleting the login is an important security step to ensure data integrity.

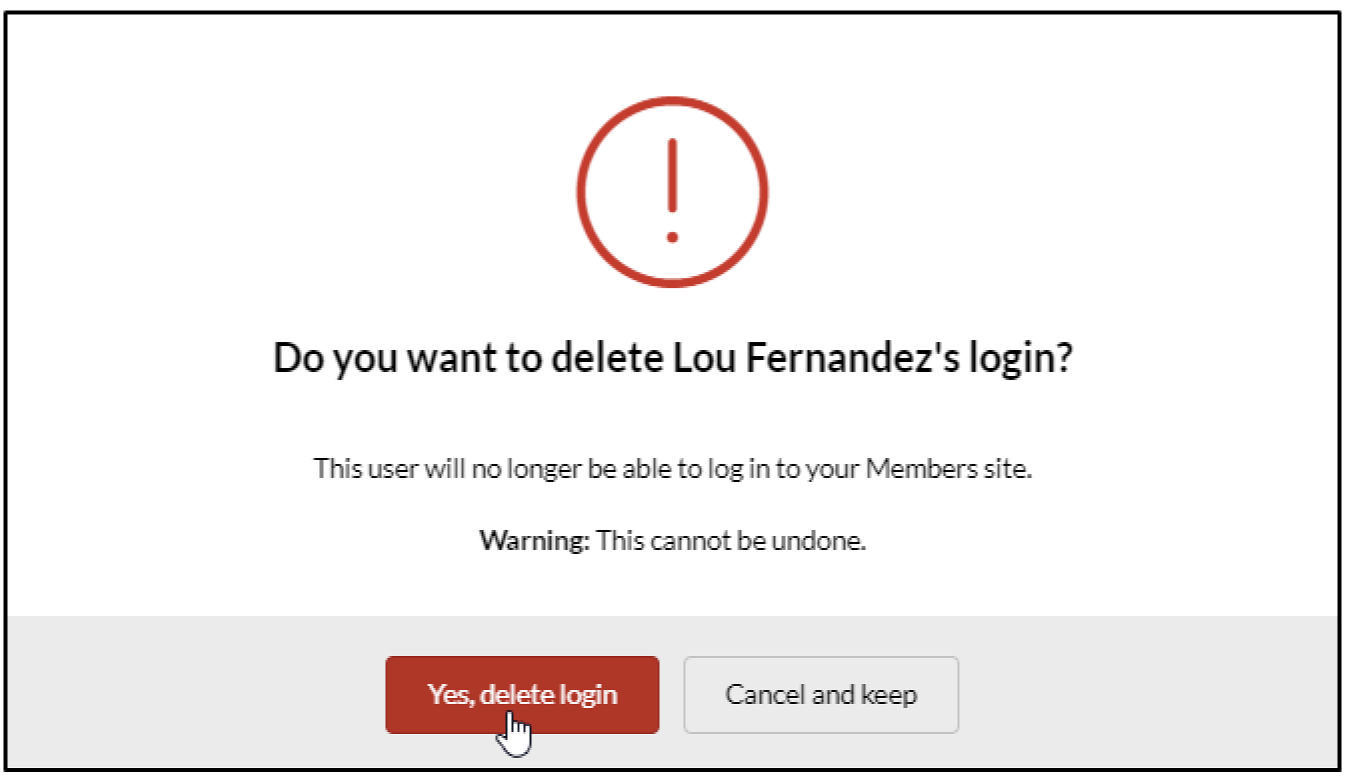
To delete a Login from your site,

1. Click on the gear icon to open your Settings view.

2. On the navigation menu on the left, select “Logins” under the Admin section.

3. Click on the trash can icon to the far right of the login you wish to delete.

4. In the confirmation window, click "Yes, delete login" to remove the user from the site.



Note: Deleted users will need to be re-invited in order to gain access to the site again.

Manually Expire a Login's Password

Data integrity and security is a major priority for churches and their management software. In a strong effort to addressing privacy and security concerns, administrators with access to the Logins view and list now have the ability to manually expire a login that might be compromised.

To mark a login password to expire,

1. Click on the gear icon to open your Settings view.

2. On the navigation menu on the left, select "Logins" under the Admin section.

3. Find the login you want to expire and click the lock icon.

There won't be a notification on the Logins view but the password will be marked as expired.

The next time this user logs into Church360°, they will receive a message that their password was expired and that the password will need to be reset.

CHURCH360°
Members

Your password has expired. You won't be able to continue using Church360° until you've created a new one.

Send Reset Instructions

Printing a Login List

During an annual review or security audit, it may be helpful to be able to print off a list of all user logins and their assigned roles.

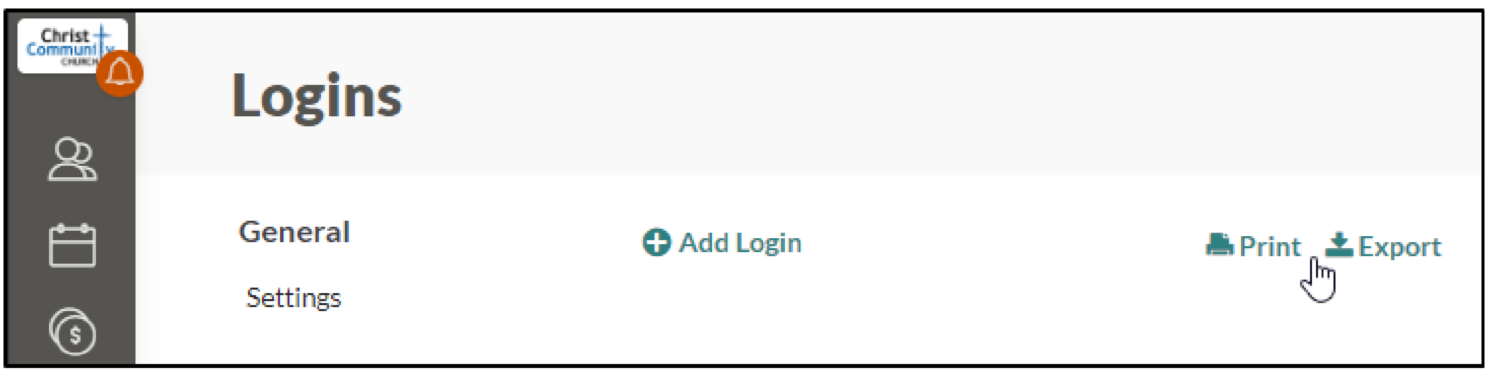
To print a Login list,

1. Click on the gear icon to open your Settings view.

2. On the navigation menu on the left, select "Logins" under the Admin section.

3. At the upper right of the view, click to print or export the list.

- Click "Print" to open the list in a print preview.
- Click "Export" to export the list into a CSV file.



Navigating the Roles view

The Roles view contains the different groupings of various permissions that can then be assigned to a login.

Action button

Like other views, the Roles view has action buttons for specific tasks. Currently, there is only one available action for Roles.

- Add Role - This button will open a window to create a new role for the site.

Role Sections and List

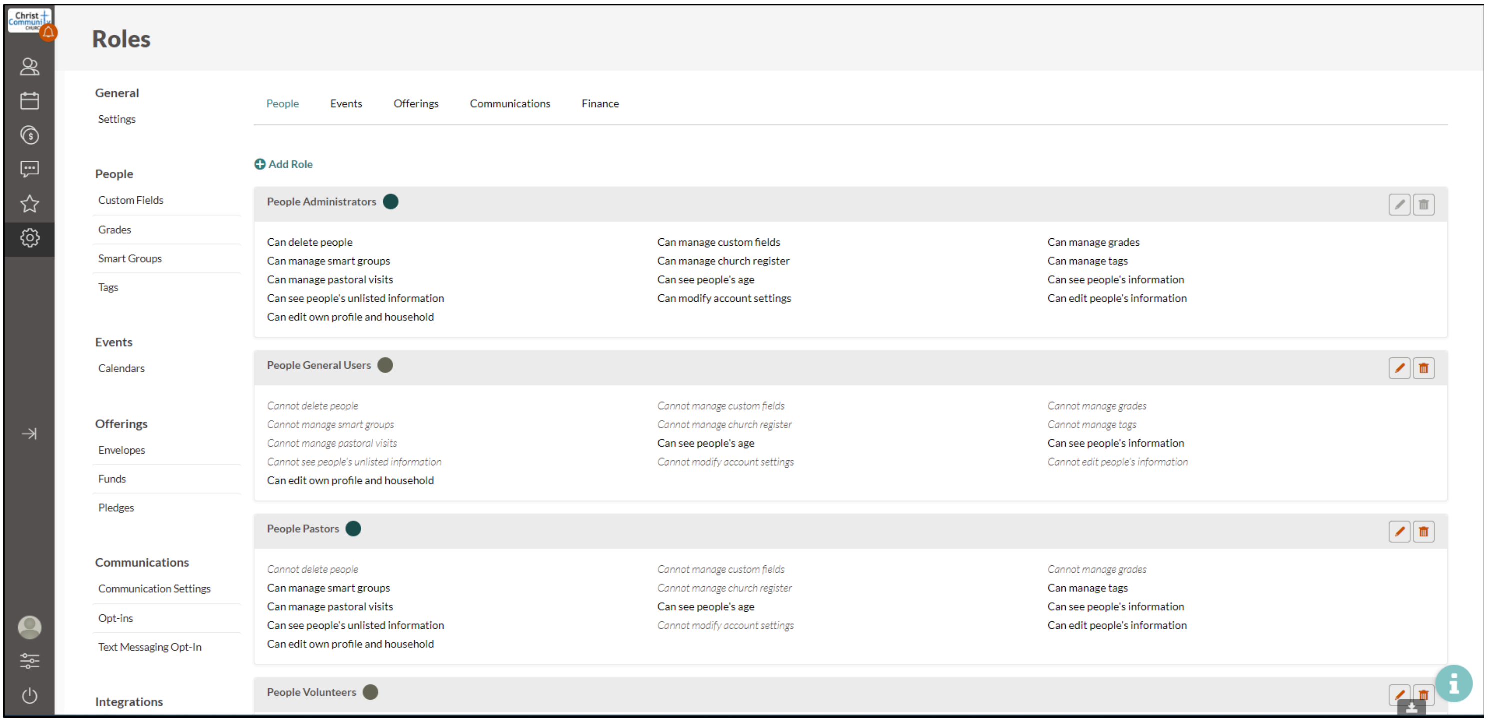
Under Roles, users can see all available Roles, along with their granular permissions.

Roles and their permissions are divided into categories based on the area of the software. Each section has default roles with common permission groupings that users can use as needed.

For more information on specific permissions and what they allow a user to do, please visit our article on role permissions.

Actions for Roles

- Edit Role - The pencil icon to the far right of the Role will open it for editing. Users can rename a role or edit its permissions. The Administrator Role for each category cannot be edited.
- Delete Role - The trash can icon to the far right of the Role will remove it. A role cannot be deleted if it's currently assigned to a Login. The Administrator Role for each category cannot be deleted.


Roles
General
Settings
People
Custom Fields
Grades
Smart Groups
Tags
Events
Calendars
Offerings
Envelopes
Funds
Pledges
Communications
Communication Settings
Opt-ins
Text Messaging Opt-In
Integrations
People
Events
Offerings
Communications
Finance
Add Role
People Administrators
Can delete people
Can manage custom fields
Can manage grades
Can manage smart groups
Can manage church register
Can manage tags
Can manage pastoral visits
Can see people's age
Can see people's information
Can see people's unlisted information
Can modify account settings
Can edit people's information
Can edit own profile and household
People General Users
Cannot delete people
Cannot manage custom fields
Cannot manage grades
Cannot manage smart groups
Cannot manage church register
Cannot manage tags
Cannot manage pastoral visits
Can see people's age
Can see people's information
Cannot see people's unlisted information
Cannot modify account settings
Cannot edit people's information
Can edit own profile and household
People Pastors
Cannot delete people
Cannot manage custom fields
Cannot manage grades
Can manage smart groups
Cannot manage church register
Can manage tags
Can manage pastoral visits
Can see people's age
Can see people's information
Can see people's unlisted information
Cannot modify account settings
Can edit people's information
Can edit own profile and household
People Volunteers

Understanding Role Permissions

When creating Logins, you'll need to select roles that will determine what that user can see and edit on your Church360° site. Role permissions will be attributed to all logins with their assigned Role.

There are five categories that group permissions for each particular aspect of the software.

People

This section determines what information a person can see about your congregation.

- Can Delete People - This permission, if enabled, will make it so a user assigned this role can archive and delete person records
  - Note: The best practice is to not delete person records. Deleting a person also deletes any offerings and attendance data tied to that individual. We advise storing the person in the archive so that historical data is intact for reporting purposes. Those people will not appear in any reports yet the offerings and attendance data will be available for reports.

- Can Manage Custom Fields - Users can add, edit, deactivate, delete, export, and print your site's custom fields. They will also see how many people are currently using each field.
- Can Manage Grades - Users can add, edit, rearrange, delete, export, and print their grade list as well as how many students are in each grade. It's important to note that the organization of the grades on the Grades view will be what the student promotion utility uses.
- Can Manage Smart Groups - Users can add, edit, deactivate, delete, export, and print the list of your church's smart groups. They can see how many people are in each smart group as well.
- Can Manage Register - Users can add, edit, and delete entries in the church register. Users must have the ability to edit people's information before this permission is available.
- Can Manage Tags - Users can add, edit, delete, export, and print their lists of tags as well as how many people have each tag.
- Can Manage Visits - Users can add, edit, export, and print their lists of pastoral visits.
- Can See People's Age - In addition to being able to see everything that the first permission in this section gives, they will also be able to see a person's full birthdate and age.
- Can See People - Users can see others' names, relationships, tags, timelines, and dates related to membership events, birthday month and day, sex, ethnic group, death date, and grade. Will also be able

to see any mailing, phone, or email information not marked as unlisted.

- Can See People's Unlisted Information - In addition to being able to see everything that the first permission in this section gives, they will also be able to see mailing, phone, and email information marked as unlisted.
- Can Modify Account Settings - This will allow users to access and edit account settings along with any other settings found in the Admin section of the menu when you click the gear icon. This includes Account Settings, Logins, Roles, Vanco Integration, and Event log.
- Can Update People - If this permission is selected, all other permissions in this section will automatically be granted. Users will be able to see and edit a person's name, mailing and contact information (listed and unlisted), relationships, tags, sex, ethnic group, birthdate and age, timelines and dates related to membership events, death date, and grade. Can also add notes to a person's timeline.
- Can Update Self - If this permission is selected the person who has this role will be able to edit their own person and household information. They will not be able to edit any personal details of any of their household or family members.

Events

The permissions under this module control access and use of the Events and Attendance sections of Church360°

- Can Delete Events - The ability to delete events from the Events calendar.
- Can Enter Attendance - Users can enter attendance and communion for events that have occurred.
- Can Manage Calendars - Users can add, edit, deactivate, and delete calendars. Users can also print or export the calendar list.
    - Note: Deleting a calendar will delete any events and attendance records related to it. Some calendars are defaults and cannot be deleted or deactivated.
- Can Review Attendance - Those who can review attendance will see attendance totals and be able to run attendance reports, but not enter data.
- Can See All Events - If a person can see events, they can access the Event Calendar to see upcoming events. (Users can add additional permissions to each calendar on the Calendar view to limit visibility)
- Can Manage Events - The ability to update events gives users the ability to add and edit events from the Events calendar. This also offers the ability to use Event Forms for attendance.
    - Note: Users will need to have permissions to enter attendance to post Event Form selections and permission to see people to match records from an Event Form.

Offerings

The permissions under this module control access and use of the Offerings section of Church360° Members, as well as related items (Funds, Envelopes, Pledges)

- Can Enter Offerings - If one can only enter offerings, they will see all current envelope numbers followed by the giver's names, though the link between the two is hidden. This will allow donors to give anonymously through only their envelope numbers. In the event donors give a check, the user will enter it in under their name.
- Can Manage Envelopes - Users can add, edit, remove, and renumber envelopes. In order to fully manage envelopes, they will be able to see which giver or givers have each envelope.
- Can Manage Funds - Users can add, edit, merge, archive, and delete funds and fund categories. A fund with any offering records can only be archived. Users will be able to print or export the fund list and see each fund's year-to-date total.
- Can Manage Pledges - Users can add, edit, delete, export, and print active or all pledges. They will be able to see the pledger's given-to-date amounts.
- Can Review Offerings - Those who can review offerings will see fund totals and be able to run basic reports, but not enter any actual data. They will not be able to run contribution statements for anyone but themselves.
- Can See Givers Names - When coupled with the ability to see people's information, users will be able to download, print, and (if the email permission is enabled) email contribution statements. Here, users will also know people's envelope numbers.

Communication

These permissions allow users to take advantage of Church360°'s voice messaging, texting, and emailing services.

- Can Manage Texting - Users will be able to enable or disable the texting opt-in page for their site, to create and send out a personalized email to encourage people to sign up, and match phone number submissions to their respective person record. Users will only be able to see phone numbers if they are not marked as being unlisted.
- Can Send emails - Users will be able to select person records to send relay messages to through their chosen email client. If a user is not granted the ability to see unlisted information, they will not be able to send emails to any email addresses marked as unlisted.
- Can Send Texts - Users will be able to select person records to send text messages to any phone numbers opted-in for texting. Users will only be able to see phone numbers if they are not marked as

being unlisted.

- Can Send Voice Messages - Users will be able to select person records to send voice messages to any phone numbers opted-in for voice blasts. Users will only be able to see phone numbers if they are not marked as being unlisted.

Ledger

The permissions under this module control access and use of the Ledger section of Church360° Members, as well as related items (Books, Payees).

- Can create budgets - Users can add budgets to any income or expense accounts marked to be budgeted.
- Can create checks - Users can create check transactions.
- Can create deposits - Users can create deposit transactions.
- Can create journal entries - Users can create journal entries.
- Can create payments - Users can create payment transactions.
- Can create payrolls - Users can create payroll transactions.
- Can create transfers - Users can transfer money between accounts of the same type.
- Can manage books - Users can add, edit, delete, export, and print active or all books. They will be able to see Books under Settings.
- Can manage the chart of accounts - Users can add, edit, delete, export, and print active or all accounts within selected books. They will be able to see the Chart of Accounts view.
- Can manage payees - Users can add, edit, delete, export, and print active or all payees. They will be able to see Payees under Settings.
- Can manage recurring transactions - Users can create, edit, and delete recurring transactions. They will be able to see the Recurring Transactions view.
- Can manage reports - Users can create, edit, and delete reports in Ledger. They will be able to see the Financial Reports view.
- Can reconcile transactions - Users can navigate to an account's details and reconcile transactions for accounts marked to be reconciled.
- Can review reports - Users can view reports that are shared with them but not add, edit, or delete them.
- Can view all books - Users can see all books in the Books view under Settings but not add, edit, or delete them.

- Can view all accounts - Users can see all accounts in the Chart of Accounts view but not add, edit, or delete them.

Adding Roles

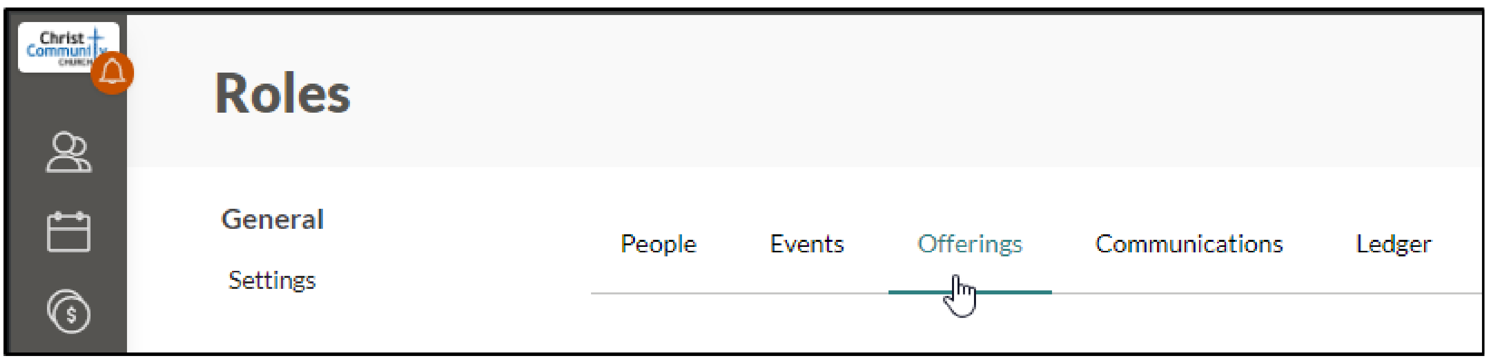
Roles represent a set of permissions that can be assigned to multiple users for different areas of Church360° Members. New roles can be added at any time and then assigned or reassigned to new and current logins.

To create a new set of permissions,

1. Click on the gear icon to open your Settings view.

2. On the navigation menu on the left, select “Roles” under the Admin section.

3. Near the top of the page, choose the area of the software the role will be in regards to.



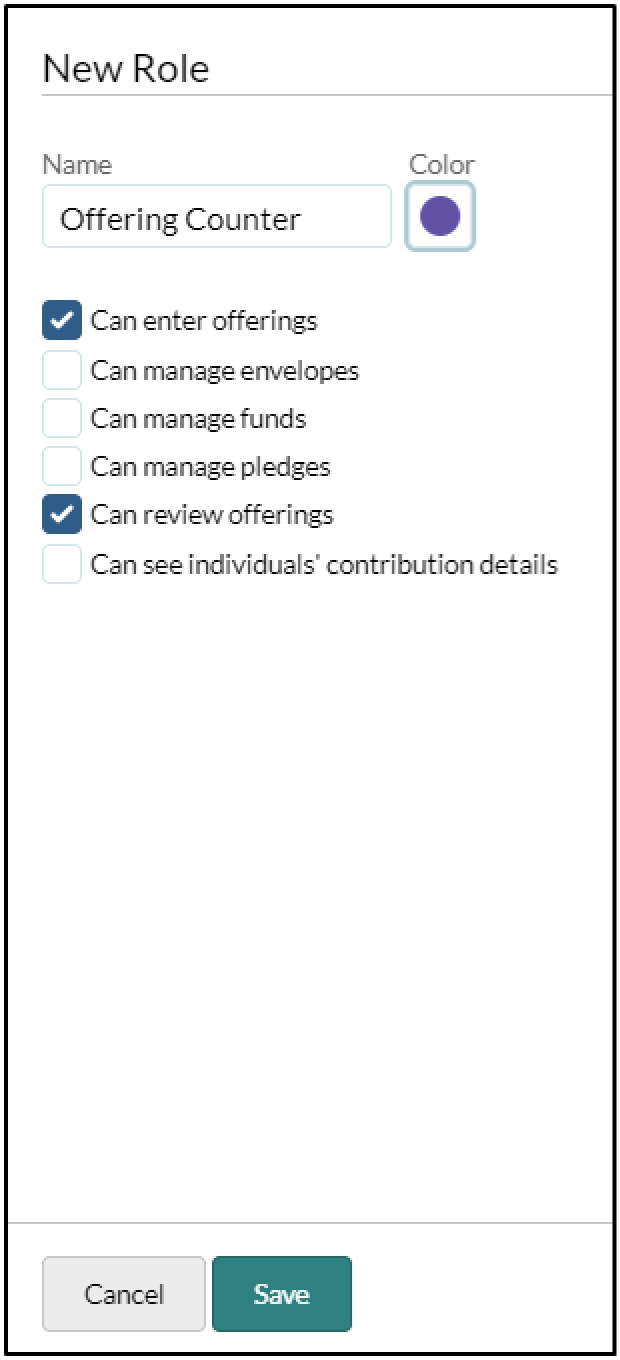
4. Click "Add Role" to start a new entry with a list of the area's permissions to the right of the screen.

5. Type in a name for the role. It's recommended to name roles based on the type of positions that will be using the role, like "Offering Counters" or "Financial Secretary".

6. If applicable, choose a relevant color for the role. It will appear in this color on the Login screen for easier identification.

7. Check the boxes for relevant permissions for the role. Some selections require other permissions in order to be marked. For example, one wouldn't be able to "Edit people's information" without the ability to "See people's information" first.

8. Click "Save" to save the role for future use.



Editing Roles

As roles and features are updated and improved upon, users may need to edit roles to restrict or enable access for any login assigned that particular role.

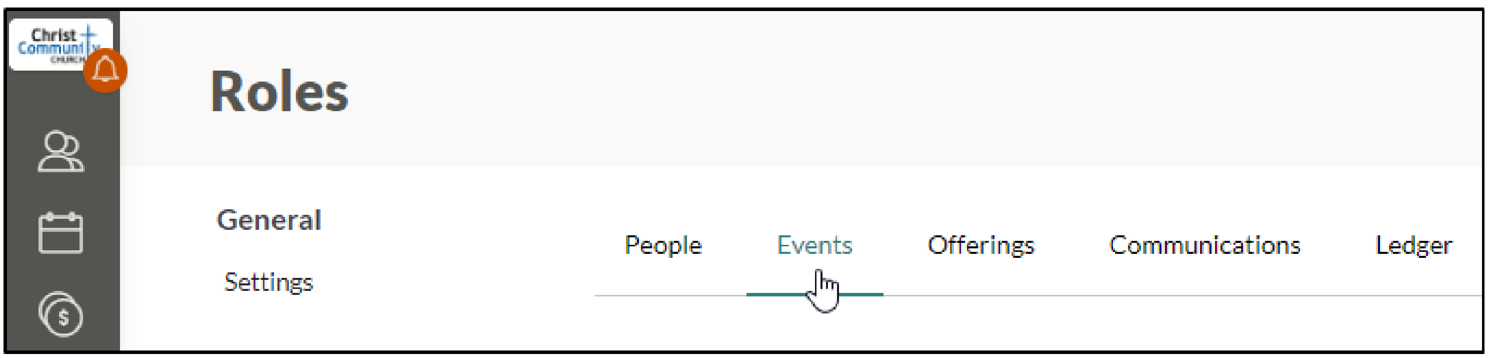
Note: Administrator roles for any area of the software cannot be edited or deleted.

To edit a role's permissions,

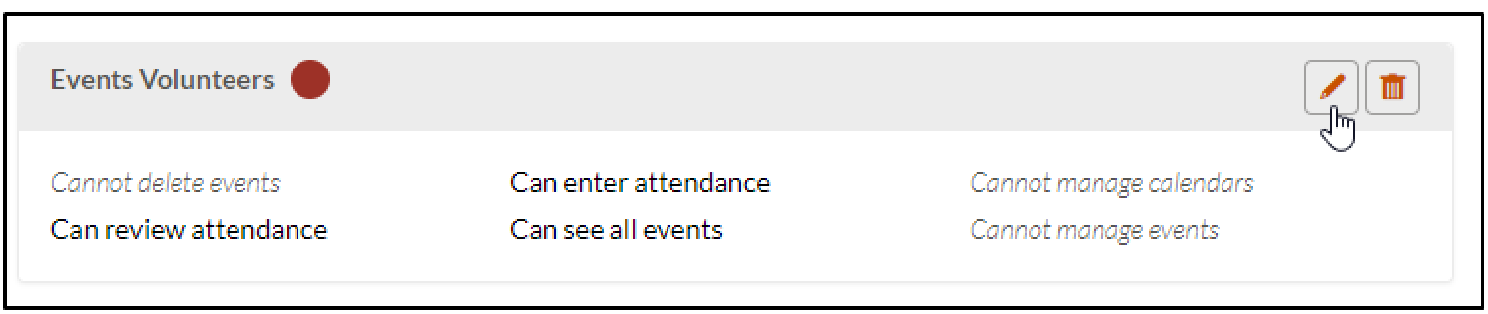
1. Click on the gear icon to open your Settings view.

2. On the navigation menu on the left, select "Roles" under the Admin section.

3. Near the top of the page, choose the area of the software the role is in regards to.

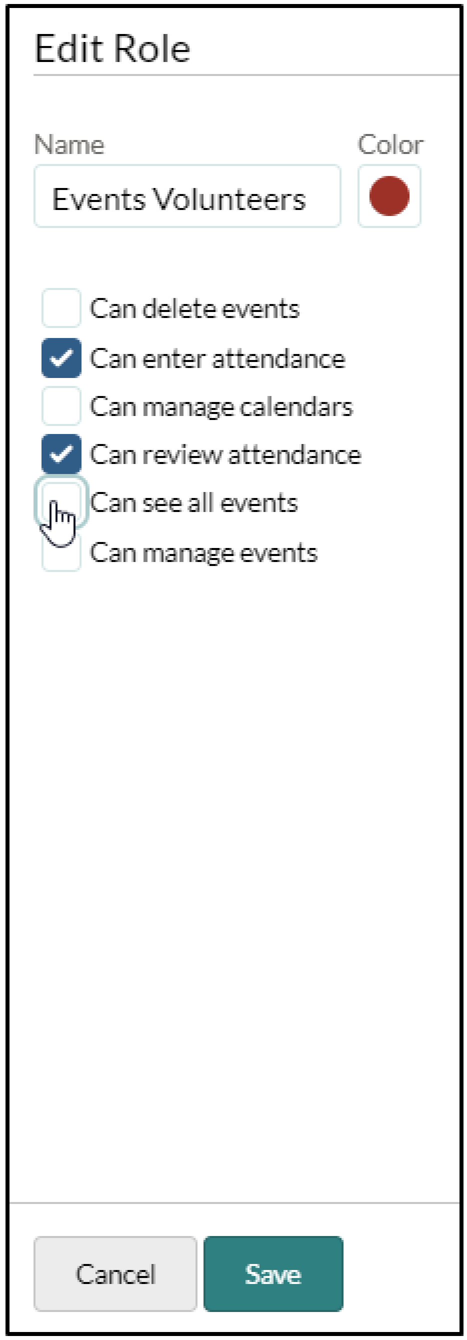


4. Find the role you need to edit and click the pencil icon to the far right of the role's name to open it for editing.



5. Make any changes to the name, color, or permissions as needed.

6. Click "Save" to save your changes.


Edit Role
Name
Color
Events Volunteers
Can delete events
Can enter attendance
Can manage calendars
Can review attendance
Can see all events
Can manage events
Cancel
Save

Deleting Roles

If a role is no longer being used, users can delete the role to remove that set of permissions.

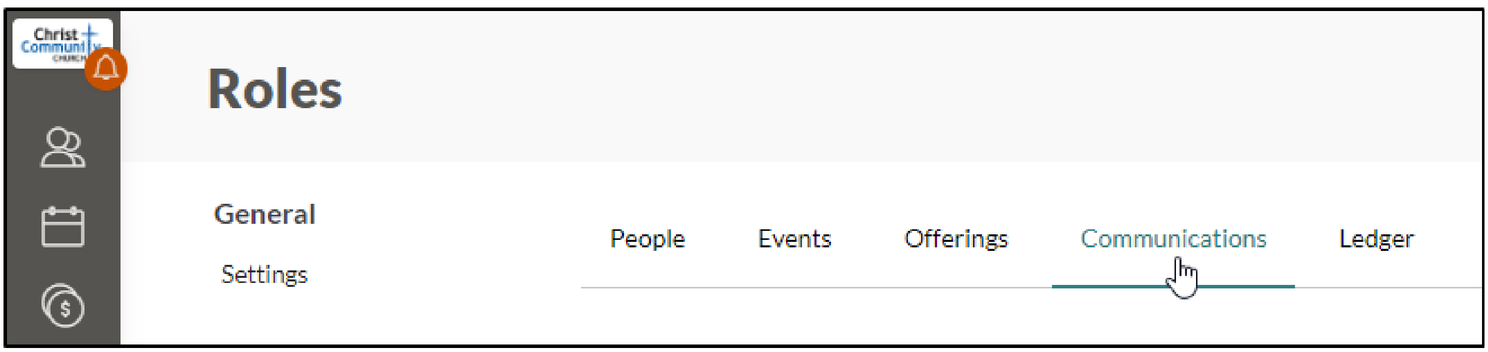
Note: Administrator roles for any area of the software cannot be edited or deleted.

To edit a role's permissions,

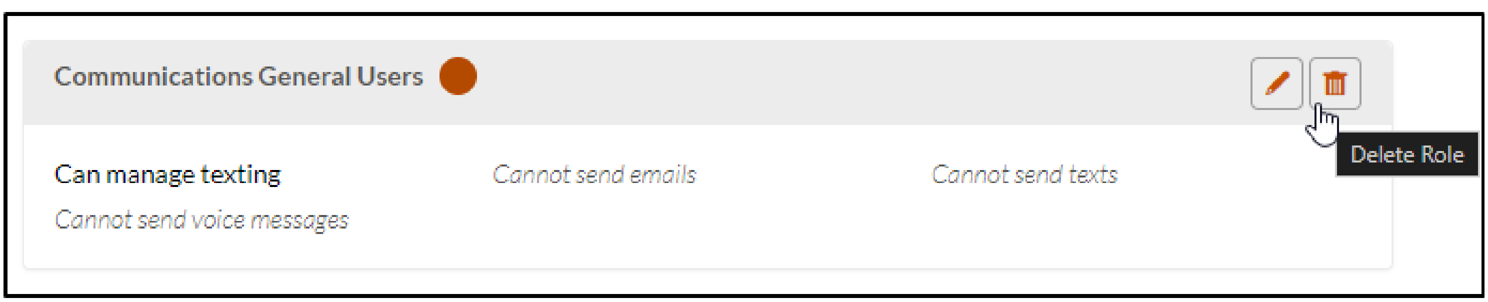
1. Click on the gear icon to open your Settings view.

2. On the navigation menu on the left, select "Roles" under the Admin section.

3. Near the top of the page, choose the area of the software the role is in regards to.



4. Find the role you need to edit and click the trash can icon to the far right of the role's name to delete it. If there are no logins currently assigned the role, it will be deleted immediately.



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 going to Settings and clicking “Event Log” under the Admin sub-heading.

Available Actions

At the top of the Event Log view, there are three fields and two buttons that users can use to navigate, filter, and report on the view.

- Search bar - Users can use this field to enter terms or names in the search bar and click "Search" to find instances of the string in the User, Record, or Description fields. Once a term has been searched for, you can click on the red X to the right to clear out the field.
- Jump to Date selector - Users can select a date using the selector and click the "Go" button to go back to entries from that period of time.
- Module selector - This filter allows users to filter based on what area of the software you want entries to show.
- Print - This option allows you to print your list of visible records and information directly from your browser.
- Export - Users can export the visible event log entries to a CSV file.

Event Log Records

Below the top row of fields, users can scroll through the list of entries as created when records are added, edited, or deleted. After scrolling down the length of the page, you'll see a button to "Load Older" entries as you need.

The Event Log table has four columns:

- When - This states both the date and time changes were made. Changes are all documented chronologically, starting with the most recent.
- User - This states which login was used to make the changes.

- Record - This states which record these changes were applied to. A house icon indicates a household record and a person icon indicates a person record. Clicking on this text will open to the record in question. If multiple records were edited, clicking on the arrow to the right of the number of people will show their names.
- Description - This gives a detailed description of the changes that were made. Changes are highlighted in red (for previous entries and deletions) and blue (for additions and new entries).