MyChurchIT Management System

MyChurchIT

Manual

Version 3.1

Blessing

We pray that this will be a blessing to you as you seek to bring glory to God and inspire people through using this system!

This is a manual to assist with knowing how the system works and using it for the benefit your ministry.

Contents

Purpose, Vision, Values and Strategy

Purpose:
Using technology to connect the Body of Christ for effective and efficient mission.

Vision:
We see the Church technologically equipped for God's mission in the days ahead.

Values:
These four are interlinked:

Honouring God - the quality of our sense of call and purpose:

> We will give God the honour for all that we have and offer
> We are devoted to God and seek God's Kingdom as our top priority
> We work so that others may come to be in relationship with our Lord and Saviour, Jesus Christ

Excellence - the quality of our work:

> We offer our best to inspire people for effective service
> We use our God-given gifts to the best of our ability
> We bring innovative ideas

Trust - the quality of our team:

> We will be trust-worthy as we work with the ministry entrusted to us
> We trust those with whom we work and serve
> We keep the quality of relationships within the team and Board.

Connection - the quality of our dealing with people:

> We will respect all our clients by offering dignity to all of God's people.
> We will listen in order the engage in a meaningful way
> We will following-up on matters raised within two days.

Strategy:

OFFERING:

We offer a world-class online church and community management system for God's Kingdom impact.
We offer self-managed websites for all, including emails and social media, with basic support and hosting.

TRAINING:
We train users of all aspects of the system and websites for effective use, through personal and online facilities.

ENVISIONING:
We create and attend various events to envision and motivate church leaders in the use of technology for effective missional impact throughout the world.

LEARNING:
We keep our work at the forefront of technology by intentionally seeking out the best means available for advancing the purposes of the Kingdom of God and the communities we serve.

Introduction: The General Idea of the System

It began with, what we believe, was a God-inspired idea for connecting clergy to their congregations through a denominational system. This has now grown and become a globally available system.

Each person is valued by God and so is valued by us

When God creates people, each one is known and loved by God throughout their journey, from conception to death and for eternity. It has been seen said that we are not earthly beings having a spiritual experience, but we are spiritual/eternal beings having an earthly experience! Each person is uniquely created and treated as such within the wider community of God.

The system assists the community of Christ to value each person and to make them disciples of Jesus, from birth to beyond death as unique persons, because

- They are valued and who matter;
- They belong because they are the Church
- They need to receive communication;
- They can be assisted with their walk with God,
- They have gifts and services to offer,
- They are the instruments of God's Kingdom.

This system starts with the individual person within a community and gives all children and people a membership place. The system then links them to families through their parents or guardians and various groups and communities.

The Benefits of the System

The system has several benefits:

- **This system carries some major denominational support**, including Anglican, Methodist and United Congregational Churches. It is also working with the Presbyterians, the Vineyard churches and other independent churches as well.
- **A centralized database:** The system has a dedicated server and is designed to hold the records of all church structures, church organizations, clergy and laity. Holding all this data in one centralized secure online database will give us the ability to act as one united church showing the love of Christ. It is important to note that the data belongs to the denomination.
- **Language friendly**: The system has been developed so that it will be available to the user in a variety of languages. We are in the Beta phase and when ready we will move our working system, the Alpha phase. Translations will start for Africa, including French and Spanish. We will add more as translations are required and given.
- **Maintain up-to-date and accurate Church records:** Various records can be kept online for access by the members and the church. For example, the church can enter records of baptisms, confirmations and the groups in which they participate, and so on.

- **Secure information:** The system is compliant with the Protection of Personal Information Act. Unlike a spreadsheet saved in a desktop which can be stolen and hacked, this is an on-line system designed to do all that is humanly possible to protect the information from hackers because it is stored and backup in different places on servers. It is like an on-line public telephone directory but for use in the congregation, including levels of security for the individual member to have control over their data themselves and who can see their information. Nowhere can a person draw a list with names aligned to email addresses, and where email addresses are only seen by the individual member and those who have specifically been given permission and access, like the clergy and membership secretary of that congregation.

- **A communication system:** It enables communication by e-mail and a word messaging system to be done from a macro to a micro level. For example, the Ministers can send a newsletter by email to everyone in the Congregation, or an email can be sent to a small group by a Society group leader. This can serve to send Birthday greetings to people on their special day, as well as used as a ministerial tool to send devotions to our youth.

- **Convenient access:** Access to the data is done via the internet using a web browser. This makes it available across all platforms like desktop computers, tablets and mobile phones. Ministers have access to their members' details wherever they are, not just in the office. So, while visiting they can see the address and location of the member.

- **Member participation:** If the congregation opts for this, then each member can log in and see and maintain their own information on the system.

- **Social outreach**: Being able to communicate with the whole church membership gives wider ability to mobilize people for God's mission in greater numbers. This can be used great effect when needing to respond to crises in our country. This system can be used to provide a platform where participants who are in business for themselves can advertise what they do. Helping to support Christians in business can be a blessing and could result in increased giving to the church. Please note, that we can provide the platform to facilitate social outreach as shown above, but do not have the experience or resources to run such projects.

- **Trends in church attendance and giving**: These statics provide a helicopter view to aid in strategic planning. For example, a denominational or network leader n can see which suburbs are strong and weak where members live and what requires attention. The Province will have an overall view of how the province is made up with real time data, this applies to all level of churches as well. Current census data is on hand for use by Bishops.

- **Stewardship**: The church giving plug-in enables members being able to track their giving through the personal portal. This will have a positive effect in encouraging members to fulfill their promises to the church. The plug-ins for the local church will be helpful to keep track of this.

The importance of a secure system

It is a matter of trust. In these days, the protection of the information entrusted by their members to their churches is vitally important. If churches are entrusted with these personal details, they can be proven to be trusted with so much more. It is a part of the Church's integrity. Keeping any personal information on a computer's hard drive means what it can be stolen and so can be hacked and used for criminal activity. This system is as safe as humanly possible as it is saved on a server and backed-up, so it cannot be lost.

The importance of adequate internet connection for faster interaction

The better the speed of your internet connection, the quicker the interaction with the data on the System. The System can work off as low as 2mpbs, but would be faster if it is above 4mbps. The installation of an ADSL line or Fibre.

Speed test on your internet connection

You can use any speed test, e.g. http://www.speedtest.net/ to see your internet speed at any time.

Making the best use of the System

As with anything, the system is only as good as the data we put within it. The initial upload can be done though an Excel Spreadsheet which the System's Administrator will give on request. Once the data is in, each congregation will have the responsibility of maintaining and adding the data.

The system is designed so that it is easy to use, using desktops and touch-screen devices. So 'play' with it and see what is available and how it works. You cannot easily break the system!

We suggest that each congregation and denomination work out what they desire from the system and create those groups at the various levels of the congregation, as required. (See Groups)

Suggestions for keeping the accuracy of the data

Here are some suggestions for maintaining the data's accuracy:

- Once or twice a year during a worships time ask the whole congregation to log on and check their details.
- Invite a group of young adults or computer literate people to be available after Sunday worship services to sit with people and assist them to update the personal data.
- Appoint a membership secretary or a trusted volunteer to systematically work through the database.

Structure

The various divisions through which someone can use the data in the online database is divided up into portals. The current list of portals is:

- **Personal Church Portal**: Used by individuals to keep their personal details up to date and engage with the church.
- **Church Portal**: This is the basic level at which all church structures are recorded. Each member belongs to one church structure. The system provides management of the members, service records, financial management and communication through emails and an on-line word messaging system;

- **Area Portal**: Focuses of the clergy, organization and groups as well as the financial management related to that, and has access to all members in that region for statistics and communication.

- **Provincial Portal**: Provides an overview, statics and communication for the Province and related groups as well as financial management related to that, and can give access to all members in that region.

- **Denominational Portal**: Provides an overview, statics and communication for the denomination and related groups, and can have access to all their denomination's members.

- **Organisation Portal:** Provides an overview, statics and communication for any organisation, and they can have access to all their denomination's members.

- **Events Portal:** Provides for event management, from an overview to registration, tracking, monitoring payments and the financial progression of your event

Except for the personal portal, access to the portals is given to authorised members using a single username and password.

Support through Phone, Skype, Microsoft Teams and Team Viewer:

We have a team of people that can support you in getting going, with initial and then ongoing training. The idea is that we have a network of people who know the System and can support each other, like one church administrator to another, in a region.

The assist with our Support, we ask that each congregation downloads **Skype and Team Viewer**, which are free off the internet.

- SKYPE: We can talk as if face-to-face, and even show each other what is on our monitor screens for better communication and understanding;

- MICOSOFT TEAMS: We set up regular MS Team meetings and tutorials for on-line support and training, which allows for live demonstrations and face-to-face interactions and Q&A;

- TEAM VIEWER: This uses a temporary yet secure way of allowing us to see what is going on with your System and your internet connections;

- ZOOM: This is another way to have a meeting or to connect without having to download an App or program. One person sets up the meeting and then sends an emailed invitation with a Meeting code inserted into the email. When clicking on the code the Zoom Meeting opens up and the participants can see one another and show their computer screens to each other.

Section 1: The Personal Portal:

What is the Personal Portal?

The personal portal is used by individual members of the church to load and maintain their personal details.

Personal profiles can be created in the following ways:

- Registration by the member themselves
- Registration by the Congregation
- Registration by the Denomination
- Registration by an Organization.

Registration:

Why the Registration process?

The system has tight security so will ask via email to verify your email address to check that it is a real person, and this is in fact the person's email address. This is followed by linking the person's personal details to the correct congregation.

Starting Out

Purpose: To get you started from the very beginning to being registered on the system.

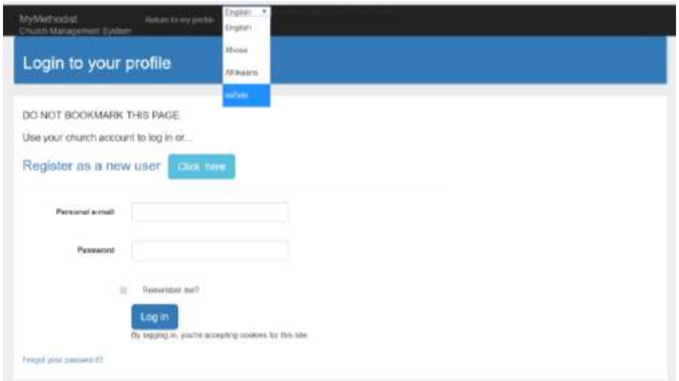
Logging In

Note: Please use Chrome as your browser. The System works best through Chrome. Though you can use others, some features, like the calendar, sometimes cause difficulties.

Open your internet browser using your denomination version of the MyChurch address: (e.g. www.MyPresby.org) and this will appear, denominational specific.

Your denomination's version of this page will then open. Through the pulldowns you can read about the features, the background, contacts, etc., and the way to log in, which is in the same place for each denomination:

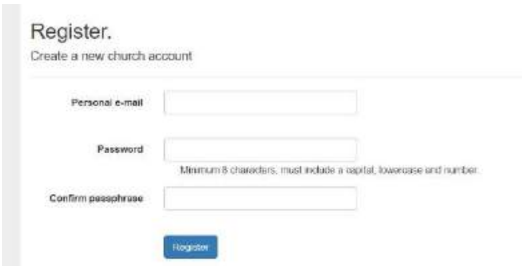
Click on **Login or Register** and you will see a page like below:



NOTE ON LANGUAGES: You will have a choice of the languages in the pull down. (We have many pages translated, however, please note that this is still a work in progress. There are many languages! If you can volunteer to assist us with this let us know!)

Correct Connection: The System will connect you to congregation to which you belong.

As a new user click on the box or the writing: Register as a new user and the following screen come up:



Here is where you link yourself to your congregation. Insert your personal and functional Email as your username. Confirmation emails will be sent to it regarding the registration process. If your congregation's data is loaded already, then it is **vitally important** that the **same email address** is used that is given for the congregation's office to use. If in the System your loaded data will appear. If not then you need to complete the data capturing process.

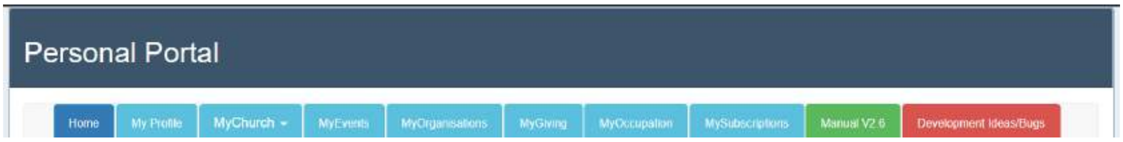
The **Password** is a word of your own choice which must be at least 8 characters, including a capital letter, at least one number and preferably one special character (example: P@ssw0rd! – please don't use this password). Repeat this password to confirm it. Please remember or keep a record of the password somewhere, but there is a "forgot Password' facility.

Click on 

Wait until you receive an email which will be sent to the address used as the username to confirm that this is your email address. If it does not arrive in the normal way, you may need to check your 'Spam' or 'Junk' boxes as some filters work that way.

Click on the link in the email confirming your registration, using your user name and password.

Log in using your new login details: Username and chosen password. You will see:



Click on My Profile and follow the instructions which will then allow you to complete your details.

- ➢ If the Congregation to which a person belongs has already given the spreadsheet to the Administrator, then the information is already on the system and can be updated and save.
- ➢ If the Congregation to which a person belongs has not processed with the bulk data upload above, then the Personal Profile will be empty and will need to be completed with all the data.

Inserting the personal information into the Profile

Please make sure that you complete this as comprehensively as possible.

To add a new member:

- click on ADD Member icon.
- check whether the member has not already been added by clicking on the link. This could happen through the member having registered him/herself for example by attending a church event or having been previously been registered by another church.
- Complete the details in the first section as follows:
  - Click on the dropdown box next to "Title" and choose the correct title.
  - Enter the member's First Name (this is a compulsory field)
  - Enter the member's Middle Names (if known).
  - Enter the member's Surname (this is a compulsory field)
  - Enter the member's Preferred Name (this is a compulsory field, because all correspondence from this System, whether via email or messaging system, will use this name to make it more personal. E.g. "Dear Lungile, …"

  - Enter the member's Date of birth by clicking on the dropdown boxes
- In the next section headed Contact Details:
  - Enter the E-mail address (if available). (Be careful that this is captured accurately as it will be used for sending e-mail messages to the member)
  - Enter the member's cell phone number (Please, no spaces between numbers)
  - Enter the member's work telephone number (Please, no spaces between numbers)
  - Enter the member's home telephone number (Please, no spaces between numbers)
  - Enter the member's Fax number (Please, no spaces between numbers)
  - If the details of the member's Skype address are available, these can also be added.
- In the next section headed Physical address, provide as much detail as possible so as to assist those involved in house visits:
  - In line 1 This is the full street address - which is required

    - In line 2 put the further information if is a in a complex or block of flats
    - Enter the Suburb name under Suburb
    - Enter the postal code under Postal/Zip Code. (this is a compulsory field)
    - Enter the name of the City
    - Click on the dropdown box for the Province and select the correct province
    - If not in South Africa, clock on the dropdown and select the correct country
- In the next section headed Postal Address:
    - Enter the post box number only next to PO Box
    - Enter the name of the Post Office
    - Enter the Postal code of the Post Office
    - If not in South Africa, clock on the dropdown and select the correct country
- In the next section headed Profile Data:

    - Click on the Home Language dropdown box and select the correct language
    - Click on the Gender dropdown box and select the appropriate gender
    - If the member has a disability, click on the dropdown box and select the appropriate disability
- In the next section headed Family Data
    - Click on the Relationship Status and select the appropriate status
    - If the person is married, the date of marriage can be included under Relationship Date by clicking on the calendar and selecting the appropriate date
    - Members of a family can be linked together by including the Partner ID, Father's ID and Mother's ID. This can only be done if the family member has already been added to the system. To find the ID number, click on the "Find" link. Children cannot be linked for the parent profile. This needs to be done by going to the child's profile and adding the parent's ID
- In the next section headed Privacy Settings
    - Uncheck the relevant box if you do not wish basic details of the member to be seen by others
    - In the final section headed Church Data [Wrong bullet setting]
    - Click on the calendar to enter the date the member joined the church
    - Click on the dropdown box under Member status and select the appropriate status
- On completion of the form, click on Add Member.

Linking Families

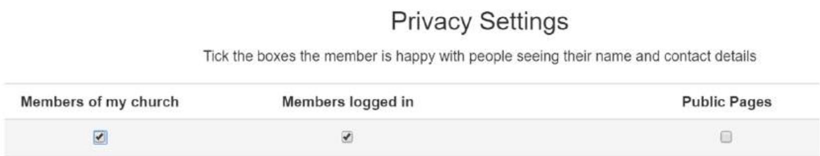
The system sees people as individuals and then links them to each other, as mentioned above. We start with the person/child and link them to their parents/guardians. We link spouses together in their profile with them MyChurch numbers.

Once all members of a family have been added, they can be linked together as a family unit through the edit function which can be accessed by clicking on edit next to their name on the All Member list or by using the search function to find and edit members. On the edit page scroll down to Family Data and insert the relevant MyChurch number only. One can only enter the partner/spouse number and the Parent/Guardian numbers. Children are only linked from the child's page.

- To link a spouse, find the Member Number of the spouse under the "Find" link, and insert it into the block. When saved the system will then show the name of the spouse in the Profile.
- We link a child to the parent/s or Guardians in the same way, by inserting the System's Member Number, and this also will appear in the actual Profile.

Privacy setting

The POPI Act requires that people can unsubscribe from all communications. So towards the bottom of the profile, you will see the following private settings make sure you have **Members of my congregation** so that this system can serve as a congregational telephone directory, and **Member logged in** so that this system can serve as a denominational directory.



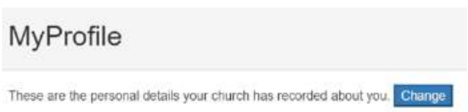
Subscriptions to emails and the Messaging System,

Members can choose at this level to NOT receive any emails, or messages, or any correspondence at all, by removing the ticks from these boxes:

An email will be sent to you confirming that your profile has been created. Again, you may need to check your 'Spam' or 'Junk' boxes as some filters turn work that way. To prevent the messages from gong to Spam, you can 'white list' the domain mychurchmanagement.org.

Editing the Profile

The POPI Act requires that every person can change their own details. If done by the member, they enter 'MyProfile' by using the user name and password, then clicking on the Change, make the changes, and the click on Apply Changes.



This can also be done by church administrator who has access and/or the member themselves.

Section 2: The Church Portal:

What is the Church Portal?

This is the basic level at which all church details are recorded. Each member can only belong to one church. The membership or Parish roll, with all membership details, can be set up through the church portal. The details of church groups, church attendance and member giving are also managed through the Church Portal.

The Portal provides a dashboard providing a summary of the status of the church membership showing various statistics about the church   including gender, home language, Disabilities, Relationships, Church status, Suburbs in which members live, and an Age profile. These statistics are all generated automatically.

Every member is allocated a unique membership number when registered on the system. This number can then be used in a number of ways such as for identifying giving on a bank statement.

Getting the Data onto the System

This section is for a congregation starting out on the system.

Capturing of the Membership Data: There are three ways of doing this:

1. The Members can all register and log in themselves individually (See section one).

   There is an outline that a Congregation's leaders can use to assist congregations that choose this route, which outlines his process that in a step by step format which can be circulated and used for this process;

2. The current data be placed, by the congregations' minister or membership secretary, into a prescribed and supplied Excel Spreadsheet.

   The prescribed Excel Spreadsheet is designed for information accuracy and all the columns need to be completed (See the next subsection below)

3. The Congregation can start from a clear base and ask all the members to complete a form with the information and have this put into the prescribed Spreadsheet and send this to us, or you can also use the +Add Member section in the Church Portal to put members into the system.

   Examples of the Membership Information Request Form and are available on request.

All the above extra information can be requested from us.

Populating the Spreadsheet

When populating the Spreadsheet, please note

- The **Red columns** indicate vital and essential information for the system to serve well;
- The **Green columns** are very important but the column works with codes as indicated on the Spreadsheet's KEY page;

- The **Black columns** need information, but can be NULL if no information is to hand.

  When done with inserting the data, the one can use the 'Search' and 'Replace' feature in Excel to fill the blank spaces with NULL.

PLEASE DO NOT CHANGE THE ORDER OF THE COLUMNS!	
Member ID	Must be blank
User ID	The system gives this number, so it must be NULL
Church ID	The System has allocated a number which the Administrator will give you.
Status ID	There must be a number here, so see the KEY for the number, or at least a 35
Title ID	There must be a number here, so see the KEY for the number, or at least a 25
First Name	Required
Middle Names	Can be NULL
Surname	Required
Preferred Name	Required: Use First Name if not known (Will be used for Communication)
Email	Can be NULL, not recommended
Tel: Cell	Can be NULL, not recommended
Tel: Work	Can be NULL, not recommended
Tel: Home	Can be NULL, not recommended
Skype	Can be NULL
Address 1	Required: put in the first section of the address. E.g. 2 Random Close
Address 2	If needed put in the second section of the Address, but can be NULL
Suburb	Required
Postal Code	Required
City	Required
Province ID	There MUST be a number here - see the KEY for the number, but can be NULL
Postal Box	Use box number only, no "PO Box" added please, or NULL
PO Extra/Pvt Bag	Can be NULL; to be used for Private Bag numbers, etc.
Post Office	For Post Office name; or NULL
PO Postal Code	For Post Office code; or NULL
Language ID	There must be a number here, so see the KEY for the number
Gender ID	There must be a number here, so see the KEY for the number
Disability ID	There must be a number here, so see the KEY for the number
System Language code	Must be '**en**' in lowercase for English
Relationship Status ID	There must be a number here, so see the KEY for the number
Relationship Date	Can be NULL OR in format yyyy-mm-dd
DOB	Required in format yyyy-mm-dd
RIP	Should be NULL; put date if you wish to keep the deceased person on the records
Partner ID	Use later after upload. MUST be NULL
Father ID	Use later after upload. MUST be NULL

Mother ID	Use later after upload. MUST be NULL
Privacy Society	Should be TRUE
Privacy Logged	Should be TRUE
Privacy Public	Should be TRUE
Subscription Email	Should be TRUE
Subscription Push	Should be TRUE
Church left Date	Use NULL
Date Entered	Today's date in format yyyy-mm-dd
Date Change	Use NULL
User ID	Leave blank because the Administrator will complete this

Sending the Data for uploading

If you are using option 2 or 3, the completed and populated Excel Spreadsheet needs to be sent directly to your system contact. It is important to note again that the more accurate the membership details are within that spreadsheet the quicker the system can work for you.

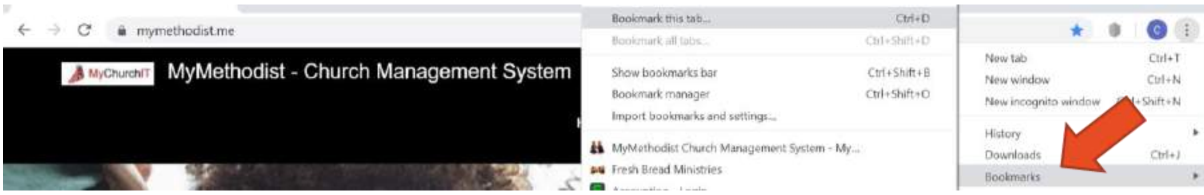
The above is to assist you, but you are encouraged to request your members to create their own login details and sign in with them all at once.

Making the System work for the Congregation

Purpose: To equip the user to set up the system so that it makes serving the congregation easier.

Setting up a shortcut to the MyChurch

When using Chrome, right click on the space just below the browser line, and the pulldown will appear and click on Bookmark manager:

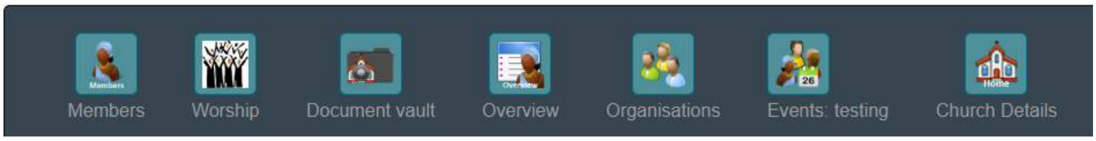


Right click and then click on Add a Page and insert both the Title and type in the name of the website. E.g Name and then in the address section type www.mypresby.org

You will then see something like this:

If MyPresby was chosen this will then appear in the line below the browser when you enter Chrome! Click there for easy link to your version of MyChurch.

The first level of Icons: from 'Members' to 'Church Details'



Members

This is where you manage the details and communication with the people in your care.

Add new member

When new people join, or a child is born to a family this is where they are added.

Each child is linked to the parents by inserting the member number of the parent and this will automatically appear in their profiles.

To add a new member:

- click on ADD Member icon.
- check whether the member has not already been added by clicking on the link. This could happen through the member having registered him/herself for example by attending a church event or having been previously been registered by another church.
- Complete the details in the first section as follows:
    - Click on the dropdown box next to "Title" and choose the correct title.
    - Enter the member's First Name (this is a compulsory field)
    - Enter the member's Middle Names (if known).
    - Enter the member's Surname (this is a compulsory field)
    - Enter the member's Preferred Name (this is a compulsory field)
    - Enter the member's Date of birth by clicking on the dropdown boxes
- In the next section headed Contact Details:
    - Enter the E-mail address (if available). (Be careful that this is captured accurately as it will be used for sending e-mail messages to the member)
    - Enter the member's cell phone number (Please, no spaces between numbers)
    - Enter the member's work telephone number (If available with no spaces)
    - Enter the member's home telephone number (If available , with no spaces)
    - In the next section headed Physical address, provide as much detail as possible so as to assist those involved in house visits:
- In line 1 (which is compulsory) include either the street address including house number or details of the complex of block of flats. The street address of the complex or block of flats can then be entered in Line 2
    - Enter the Suburb name under Suburb
    - Enter the postal code under Postal/Zip Code (this is a compulsory field)
    - Enter the name of the City
    - Click on the dropdown box for the Province and select the correct province
    - If not in South Africa, clock on the dropdown and select the correct country
- In the next section headed Profile Data
    - Click on the Home Language dropdown box and select the correct language

- Click on the Gender dropdown box and select the appropriate gender
    - If the member has a disability, click on the dropdown box and select the appropriate disability
    - Click on the Church Status dropdown box and select the correct status
- On completion of the form, click on 'Click here to Add Member's Profile'.

*These sections below are for further details and will only appear once you have completed this initial information and saved it. This further information can be captured and you enter in the person's Profile and click on '**Change'**. These include:*

- In the section headed Postal Address:
    - Enter the post box number only next to PO Box
    - Enter the name of the Post Office
    - Enter the Postal code of the Post Office
    - If not in South Africa, clock on the dropdown and select the correct country
- In the next section headed Family Data
    - Click on the Relationship Status and select the appropriate status
    - If the person is married, the date of marriage can be included under Relationship Date by clicking on the calendar and selecting the appropriate date
    - Members of a family can be linked together by including the Partner ID, Father's ID and Mother's ID. This can only be done if the family member has already been added to the system. To find the ID number, click on the "Find" link. Children cannot be linked for the parent profile. This needs to be done by going to the child's profile and adding the parent's ID
- In the next section headed Privacy Settings
    - Uncheck the relevant box if you do not wish basic details of the member to be seen by others
    - In the final section headed Church Data
    - Click on the calendar to enter the date the member joined the church
    - Click on the dropdown box under Member status and select the appropriate status

Once all members of a family have been added, they can be linked together as a family unit through the edit function which can be accessed by clicking on edit next to their name on the All Member list or by using the search function to find and edit members. On the edit page scroll down to Family Data and insert the relevant MA ID number. One can only enter the partner/spouse number and the Parent/Guardian numbers. Children can only be linked from the child's page.

Search for a member and print those details

You can search for member through 'Find Member' and a list will appear. You can print the individual person's details. This is useful for visitation, etc. You can print a second page for further details.

Birthdays

A way of keeping personal contact with the people in a congregation is to remember their birthdays and this can be done by sending them a personal email. Later this will be added to work through the WhatApp. When in this section, click on the email of message section next to the person's name and this will set up the email using your own system (e.g. Outlook) and message the person immediately. This message can be edited, and a message added t the email before sending.

Anniversaries

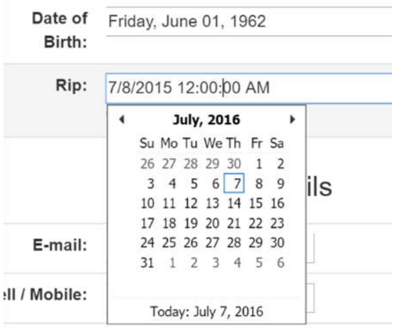
Once you have recorded the member's wedding anniversaries (See relationship date in the Profiles) you can use this section to recognise the celebration events and affirm people's love and relationships.

RIP Anniversaries

When a person dies this is recorded in the person's Personal Portal under Status as RIP and with the date. Once this is done these names will appear in the "RIP Anniversaries" section in date order for the next 60 days from the current date. You can use this for follow up pastoral contact.

When a person dies

In the Person's personal portal go to 'Church Status', and choose RIP from the pull-down menu:



Under Date of Birth you will find the "Rip:" and choose the date of death from the pull-down calendar.

The person will then automatically be moved from the "All Active members" list and placed into the "Non-Active members" list.

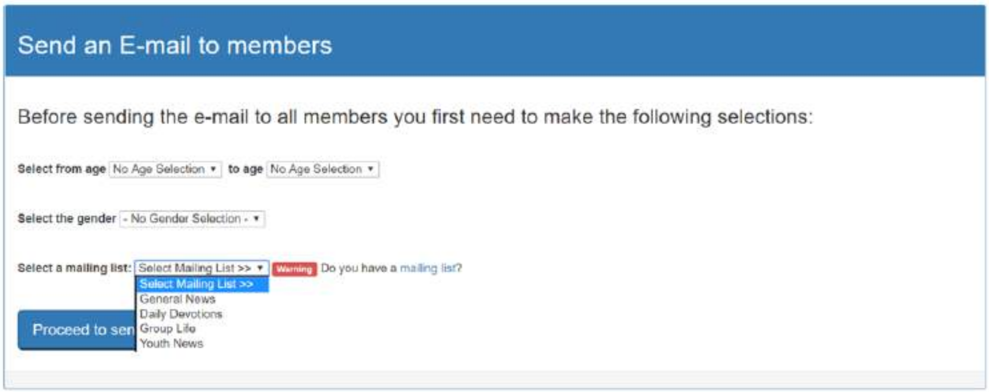
Transferring members from one congregation to another

If the person is transferring to another congregation within that Denomination (or another Denomination that is using the same system), they keep the Personal Member Number and the data in their Profile goes with them. The transfer is done through simply changing the congregation's name or number. There is a process to do the transfer involves removing the person leaving from any group/s in that particular Congregation to which they were connected prior to transferring them.

Emailing all members (Bulk emailing)

This enable you to send bulk emails to all your members with ease. You will need to set up the mailing lists (See Mailing Lists) for the various emails that you send out. For example, Newsletter, Daily Devotions, Bulletin, Special Notice, etc. Once that is done you can choose the one and send the email.

Take note of a few features here:



- You can make an age selection from the drop-downs or you make no age selection and the email will send to all your people;
- You can select the recipients of the email by gender or make no selection and this will go to all tour members;
- You choose the nature of the email from your Mailing List (e.g. General Newsletter);
- You choose the sending email address the bulk email is sent from within your system;

- Then choose the Subject of the email:

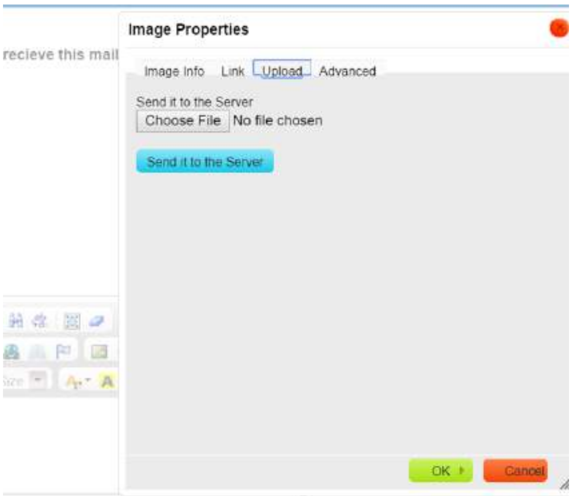
- Attachments:

There is the capacity to attach up to four attachments to a recommended maximum of 2 megabytes each. The attachments' megabytes should be kept as low as possible so as to use up people's data. Always send documents as PDF and use programs like https://smallpdf.com/compress-pdf to reduce their size.

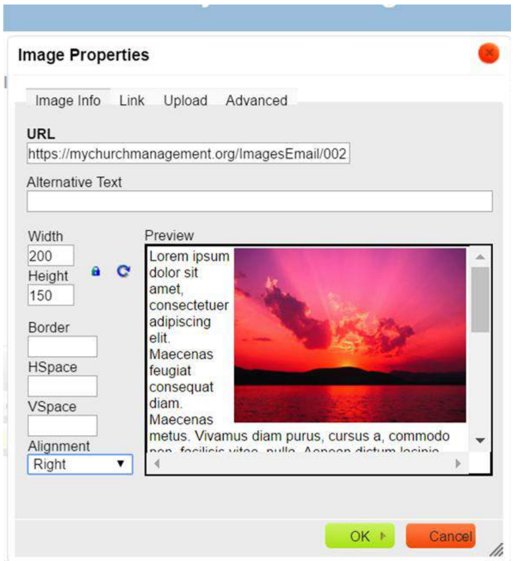
- Email features: Hover over each of the pictures to see what they do

- Inserting a link: If you wish to put in a link to another site, Click on Link and add in the URL address and click OK.

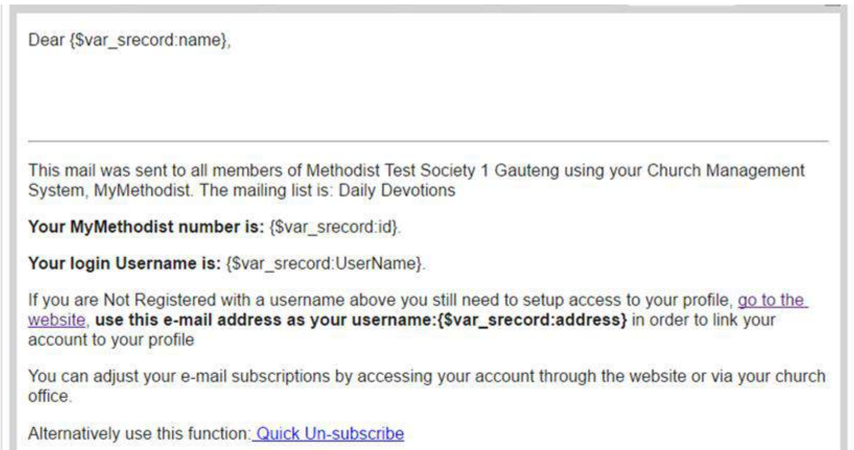
- Inserting a picture: To put in a picture (or a signature saved as a picture), click on image icon, go to Upload, choose the file and upload this to the server



Then edit the picture's size, etc. and click OK.

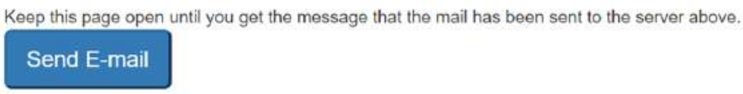


- Mail merging the names: This is done automatically where it inserts the member’s preferred name where the {$var_srecord name} is:



Also the person will see who this is from, which congregation they belong to, their member number and username to show that this is a legitimate email. Thy can also unsubscribe from any one particular bulk email, while still receiving the others.

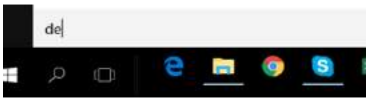
- Then send the email:

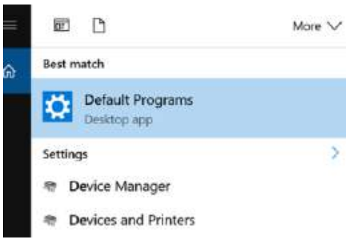


- You will see that it is queued in the bulk email system and may take a while to be delivered, depending on the amount of emails being sent at that time.

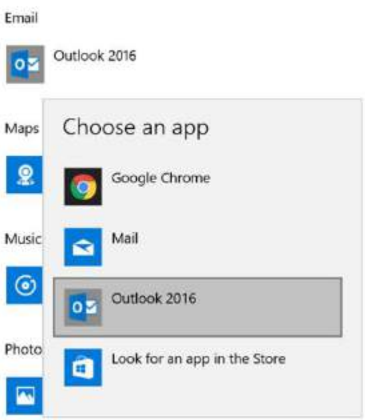
What to do if the System’s Email set up does not connect to emailing system, e.g Outlook:

Go to Search Window and type in 'Default Programs' :





When you click on Default Programs, you will see the following:



Click on 'Email' and choose e.g. 'Outlook':

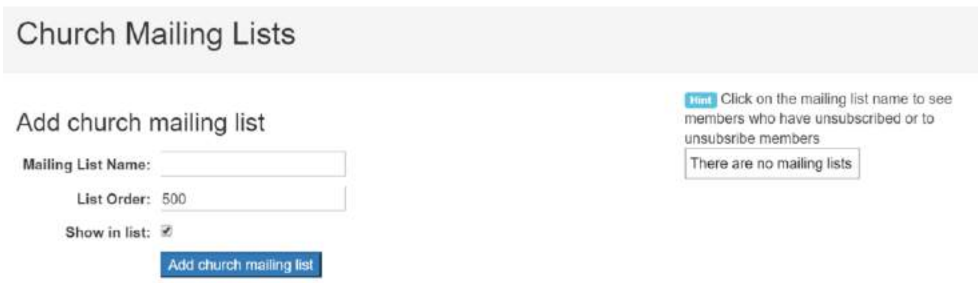
Note on subscribe and unsubscribe: With each email, the members have the option to either continuing to receive these emails, or not. If not, they can then Unsubscribe, and will no longer receive that bulk email. This can also be done by ‘Quick Unsubscribe’ in one of three ways: in the email, itself; or by logging in and changing in personal portal; or by asking the church office to do it.

The Mailing Lists

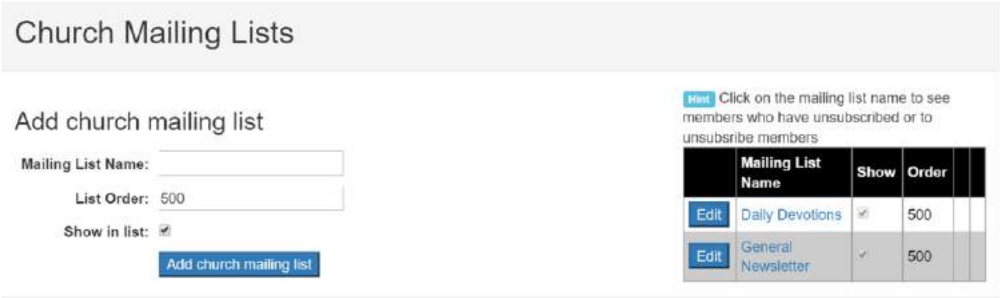
You set up the various mailing lists, as you require, for the bulk emails to the whole congregation. For example: Newsletter, Daily Devotions, Bulletin, Special Notice, etc.

Please note that this section is for the bulk emails, and the other emails to groups within the church are set up and used through the Groups (See Groups).

After clicking on the icon, there is the option for setting up the various types of mailing lists:



For example: General Newsletter, Daily Devotions, etc.



You are also able to see who has Unsubscribed from each bulk email list simply for record purposes.

Having set this up, when sending the email, there is the choice in the pull down:

Mailing Success for Bulk emails

This assist you to see which emails were sent successfully with a drop-down of the latest bulk emails sent by date.

Mailing errors on Bulk emails

The purpose of this is a diagnostic on email delivery, to discover where an error lies, if the email is not received.

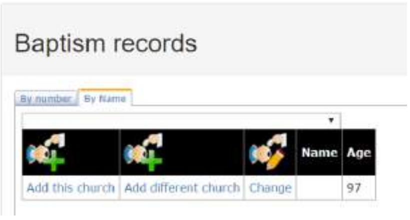
E.g. the email address is incorrect with a colon and not a 'dot': '….@gmail;com' as opposed to '…@gmail.com'

This makes it clear that, if the email was not received and the System has successfully sent it, then the you will need to look elsewhere for the reason why.

Add and change baptism records

These enable you to **add** and **correct** baptism records to a person's profile. This can replace the written baptismal record, though not the certificate.

Once in this section, select the person by name or number.



Add this church is if the baptism took place in the church/congregation where you are recording this event.

Add different church is if the event took place in another venue.

When adding the details if this is your venue then then that is recorded automatically e.g. 'Northfield'.

Use the drop-down calendar for the date.

But if the baptism took places at another venue this and the denomination needs to be inserted:

Click the **Add baptism record** to save the entry.

Add and change confirmation records

These enable you to **add** and **correct** conformation records to a person's profile, though not the certificate.

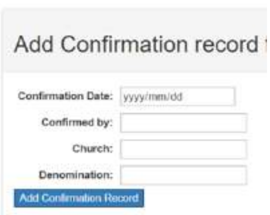
Once in this section, select the person by name or number.

Add this church is if the confirmation took place in the church/congregation where you are recording this event.

Add different church is if the event took place in another venue.

When adding the details if this is your venue then then that is recorded automatically e.g. 'Northfield'.

Use the drop-down calendar for the date.



If the confirmation took place at another venue, the officiant minister's name, the church/congregation and the denomination need to be inserted:

Click the **Add baptism record** to save the entry.

Transferring members

Each congregation can transfer their member to another congregation, but not from another congregation.

If a member has transferred into your congregation and already exists in the System, a notice will appear with the member's name. You will need to conform with that new member if this is correct as there can be a few people with the same name. The email address is often the real identification of the correct person. If this is the person, kindly Google and find the contact details of the previous congregation and ask them to transfer the member.

Transferring out: Click on the icon and you have the option to search for a member by name of member number:

When selected, choose the Denomination, region and then congregation to which the person is being transferred.

If the person is in a group, this will appear under "**Groups member belongs to**:", and they will need to be removed from all the groups before the transfer can be done, by clicking on the remove button.

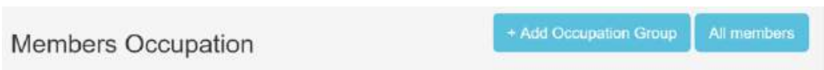
Click on the 'Transfer member to new Congregation'. That congregation's administrator will receive and email of this transfer (if they are using the System). The system will automatically keep a record of this transfer in this portal.

Occupation

If a congregation wishes to mobilise their volunteer base or simply know the occupations of their people, this facility it can assist with that.

When you click on this icon, some options come up and you can populate the area with the names of the people from your congregation.

For example, under Member's Occupation, click on +Add Occupation Group and create groups in the Accounting section:



E.g.:

Accounting

Group Details	Add Member	Add Friend	E-mail Members	Send App Message
Book Keepers	Click here	Click here	Click here	Click here
Chartered Accountant	Click here	Click here	Click here	Click here

When you click on this icon, some options come up and you can populate the area with the names of the people from your congregation.

Families

This gives the families grouped together, with the names of the parent/s and the details of the children linked to them.

This will only work when you have linked together through the Personal Portal.

Member's Suburbs

Here you can see where your people live according to the suburbs in which they live. When clicking on the suburb a list will appear under these headings:

	Title	First Name	Surname	E-mail	Cell	Age

There are many uses for this section. For example, you can have an Area Pastor care for the people in a geographic area; you can manage your minister's time and energy by visiting several people in the same area; you can form Home Groups in that area by seeing who lives there.

Print Families

This section allows you to see the family units with the names of the parent/s and the linked children.

Name	Cell	E-mail	Address	Relationship Language

Children	Age	Cell	E-mail

Remember to set this up in the Personal Portals.

Lists: All active, Non-active, Excel download and pictures

The system allows the members to see the full list of **Active** members like a telephone directory.

There is also the list of **Non-active** members who are within the sphere of the church's influence, e.g. the RIP's and the parents of children who attend the Children's Church but have not joined to the church. You can also see all of these in one list in **ALL** people in the database.

The **Download member spreadsheet** puts the data onto an Excel spreadsheet, means that several things can be done with the data: labels, nametags, etc. can be made from the Excel version of the data. We did not design the printing capacity directly from the system, because printers and sizes of labels differ.

The **All active members images** list will show the list of people with their names and their images. Remember to put the pictures in their personal profiles.

Grant/Remove Access

Access is given at this level is given to those who have authority to change the data on the system, namely the clergy and the church administrators and/or leaders. The system's administrator will give the key person Access, and they in turn can give and remove access from people.

Only a person who is on the system and has completed the Registration process will be eligible to be given this kind of congregational access.

There are three areas where Access needs to be given and each is only for that section:

Who sees what?

Access is given to each section separately, so that the church leadership can differentiate between who sees what information. For example, the person who captures the Sunday worship attendance can be given permission to add service records, however, will not have access to the entire portal or the Finance portal. Also, only people with access to the financial portal can see its details, not even people who have admin access can see this aspect.

Removal of Access for any person to a portal is at the click of the button: 

Registered Web Access

Here the person who has been granted administration access to the system is able to see who has registered on the system using the registration process.

Unconfirmed Login Email

This is only to assist if the member is not receiving conformation emails through the login process

Unconfirmed Login Email List

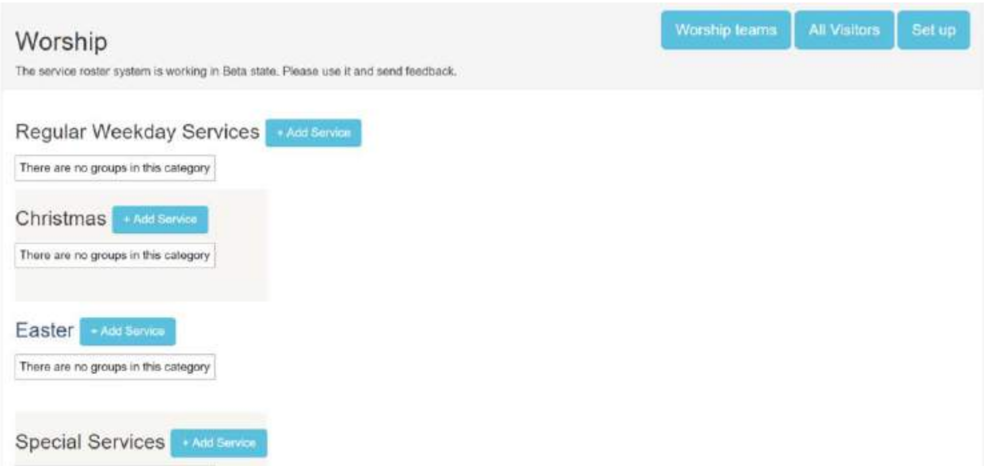
This shows the list of those members who are in the process of registering but need their emails to be confirmed. The local church administrator can do this manually for those on the list which appears.

Worship

The Worship Portal is dynamic and will be a very helpful tool for enabling meaning worship events, communication and report keeping.

When you enter this portal, you see the facilities:

- Worship Services
- Worship teams
- All Visitors
- Set up
- Something like this will appear as you add services:

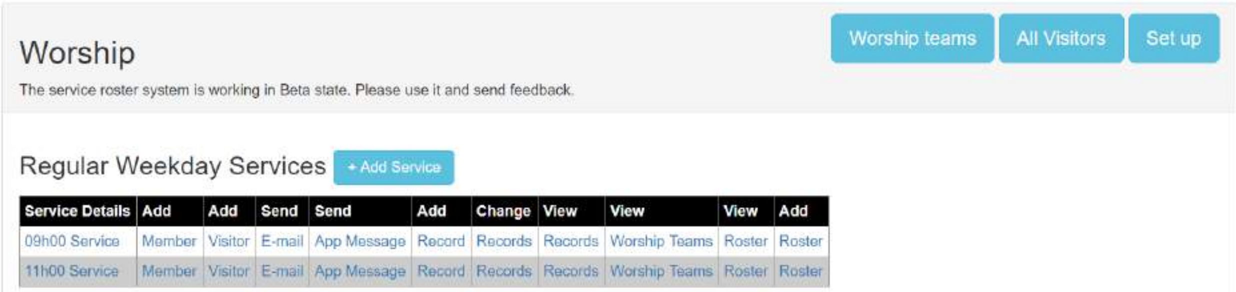


Creating and managing worship service events:

To create or add Church services, next to 'Regular Weekday Services' click on '+ Add Service' and the places will appear for you to set up the services with the details.

For example:

Something like this will appear as you add services:



Worship

The service roster system is working in Beta state. Please use it and send feedback.

Worship teams | All Visitors | Set up

Regular Weekday Services

+ Add Service

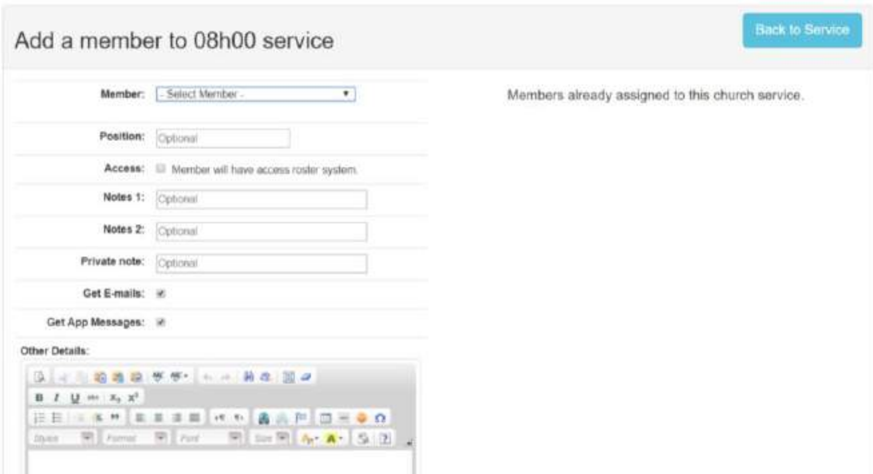
Service Details	Add	Add	Send	Send	Add	Change	View	View	View	Add
09h00 Service	Member	Visitor	E-mail	App Message	Record	Records	Records	Worship Teams	Roster	Roster
11h00 Service	Member	Visitor	E-mail	App Message	Record	Records	Records	Worship Teams	Roster	Roster

Assigning worshippers for a specific Worship service

If you have more than one worship event you can populate that event with those who usually attend that event. Go to 'Add - Member':

Service Details	Add
09h00 Service	Member
11h00 Service	Member

Then select the members form the pull down and complete the details:



Emailing or messaging the worshippers from a Worship service

You have the facility to send a bulk emails or bulk messages to all the worshippers of a specific worship services. For example, you wish to send a specific notice for that worship event of something special happening at only that Worship service.

Service Details	Add	Add	Send	Send
09h00 Service	Member	Visitor	E-mail	App Message
11h00 Service	Member	Visitor	E-mail	App Message

Click on 'Send – Email' and follow the instructions as per emails.

Setting up and maintaining the Worship register

To add and update the Service register

Service Details	Add	Add	Send	Send	Add	Change	View
09h00 Service	Member	Visitor	E-mail	App Message	Record	Records	Records
11h00 Service	Member	Visitor	E-mail	App Message	Record	Records	Records

Go to 'Add – Record' and this will appear:

- Select the appropriate service
- Complete the attendance details
- Click on the date of the service and select the date
- Include comments about the service, if desired
- Click on Add service record

To edit a service

Click on 'Change – Records' and make changes

Service Details	Add	Add	Send	Send	Add	Change	View
09h00 Service	Member	Visitor	E-mail	App Message	Record	Records	Records
11h00 Service	Member	Visitor	E-mail	App Message	Record	Records	Records

- Go to the line of the relevant service e.g. 09h00
- Click under the column Change, 'Records' and make the necessary change.
- Click on 'Change'.

To view the graph of worship trends

In order to view a graphic record of the worship trends in attendance, you will need to have installed a month's worth of data.

Service Details	Add	Add	Send	Send	Add	Change	View
09h00 Service	Member	Visitor	E-mail	App Message	Record	Records	Records
11h00 Service	Member	Visitor	E-mail	App Message	Record	Records	Records

Click on the appropriate service under 'View' click on 'Records' to see trends, which can look like this:

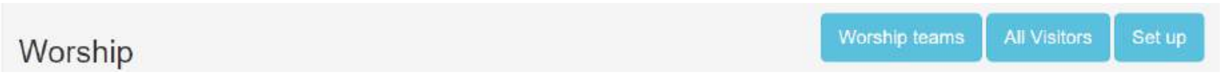
Setting up the various teams that enable the Worship services

<u>Important Note</u>: There are two faces to the Worship Portal:

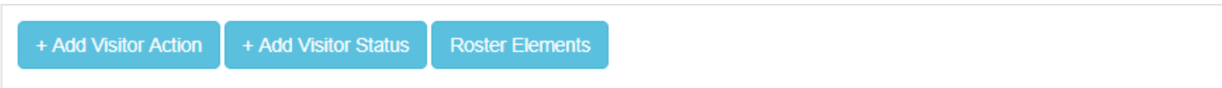
1. **Worship Service Rosters: This is where the teams are set up as a once off ask;**
2. **Worship Service Formats: This is where an order of worship is created (see Section 7)**

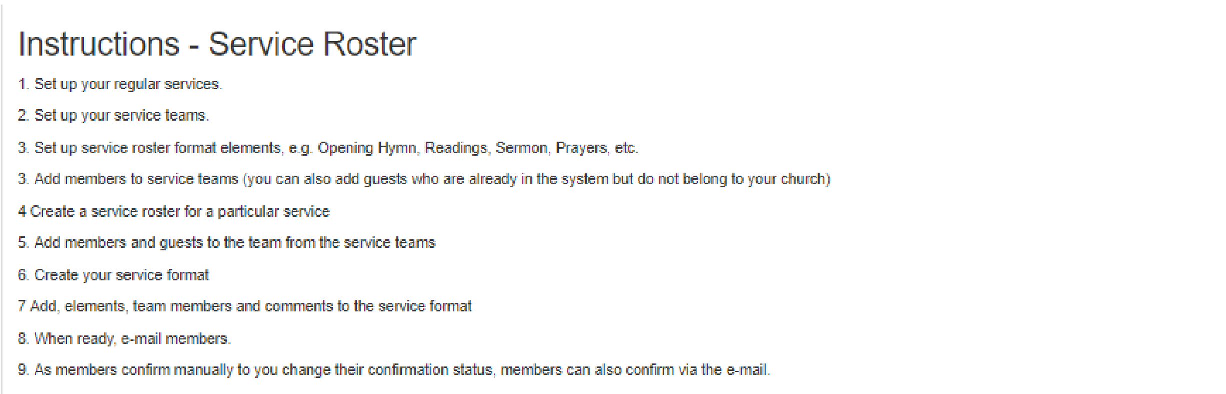
<u>Purpose</u>: We have created this facility to make planning worship easier, while communicating with all the persons involved in worship a pleasing experience. You will be able to:

- honour God by keeping the focus on God;
- smoothly organise and synchronise each Worship services;
- honour the people involved, many of who are volunteers;
- communicate with and harmoniously coordinate the teams of people involved;
- plan annually, quarterly, or monthly, in advance the various rosters;
- create a way for the team members to keep in touch with each other and so manage their availability.

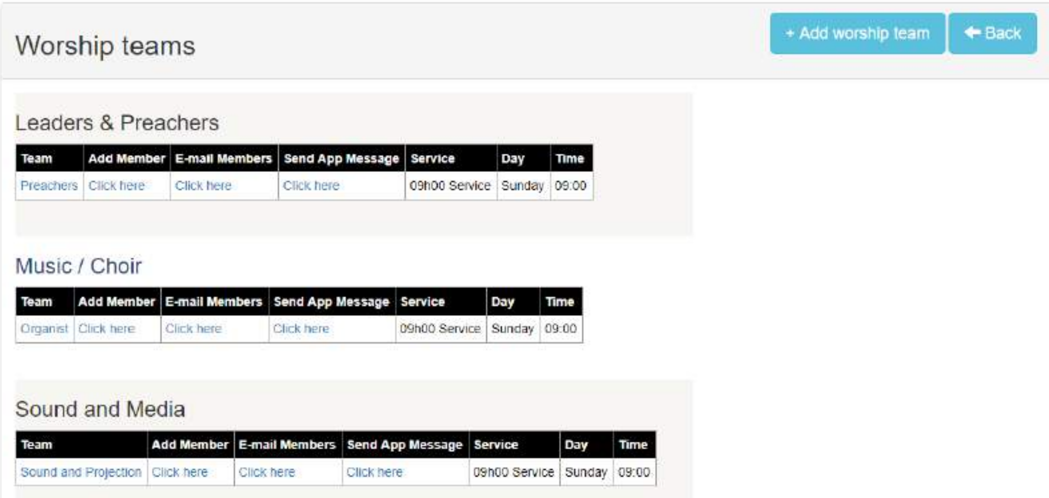


To do this, under 'Set up' click on 'Roster Elements/Aspects' and see the following instructions:



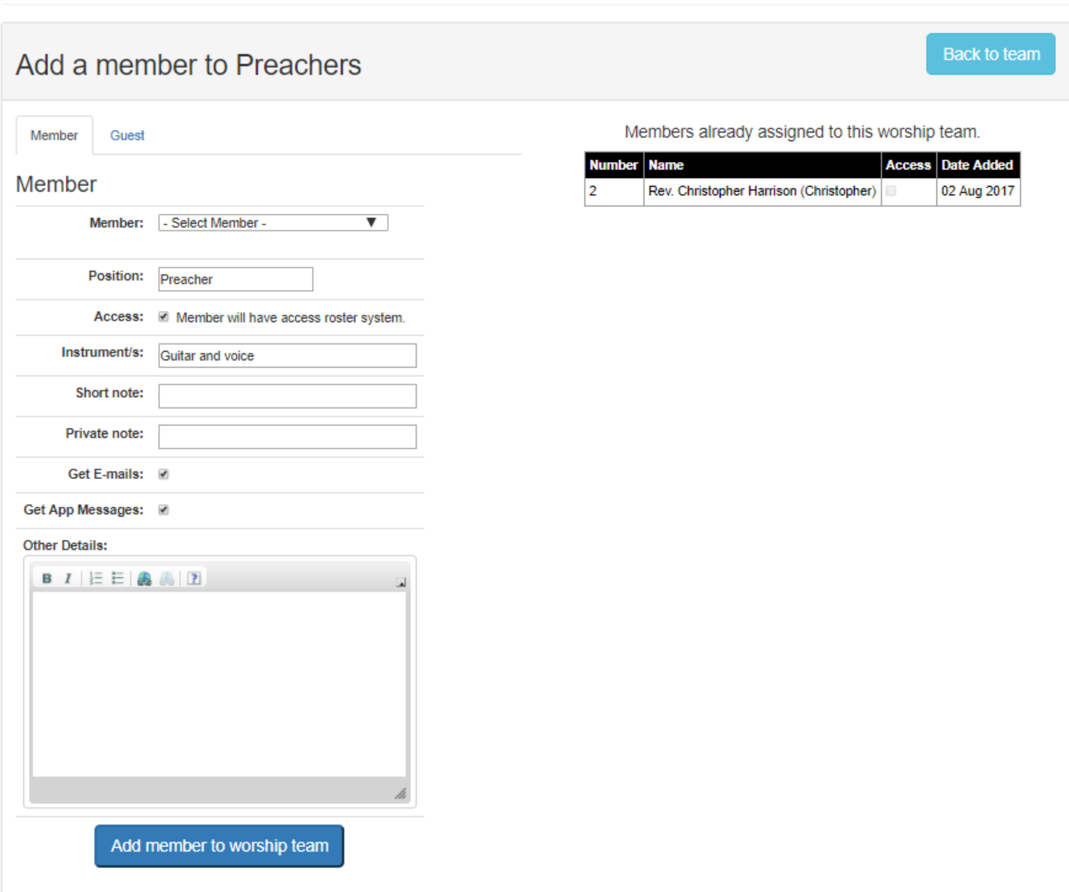


You can create teams, for example:



Note: Make the Preachers in a generic group and not allocated to a specific Worship service.

The add people to that group for your membership:



So, the list can look like this:

Team	Grouping	Add Member	E-mail Members	Send App Message
9am Bible Readers	Readers & Prayers	Click here	Click here	Click here
Communion Stewards	Worship Teams	Click here	Click here	Click here
Intercessory Team	Readers & Prayers	Click here	Click here	Click here
Offertory Steward	Collection counters	Click here	Click here	Click here
Organist	Music / Choir	Click here	Click here	Click here
Preachers	Leaders & Preachers	Click here	Click here	Click here
Rail Prayers	Readers & Prayers	Click here	Click here	Click here
Sound and Projection	Sound and Media	Click here	Click here	Click here
Tea Duty Team	Ushers / Welcomers	Click here	Click here	Click here
Welcome Desk Team 9h00	Ushers / Welcomers	Click here	Click here	Click here

Setting up Rosters with the teams

Worship Service Formats: Having set up the teams, this is where an order of worship is created:

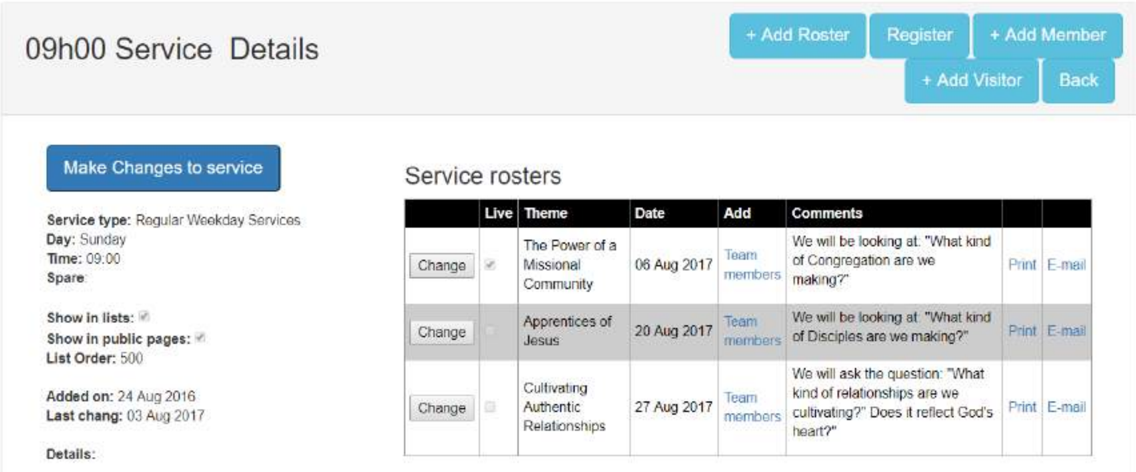
a. Set up the Service Rosters
b. General format of the Services
c. Add Element/Aspect to the list in order
d. Choose the team members involved
e. Create a specific order of worship using the elements
f. Email the members with their duties and the order
g. The worship team members need to confirm from within the email or find a replacement within the team by going into the MyChurch System.

Firstly, set up Service Rosters, by going to 'Add – Roster':

Service Details	Add	Add	Send	Send	Add	Change	View	View	View	Add
09h00 Service	Member	Visitor	E-mail	App Message	Record	Records	Records	Worship Teams	Roster	Roster
11h00 Service	Member	Visitor	E-mail	App Message	Record	Records	Records	Worship Teams	Roster	Roster

Choose the date and theme, but do not 'go live' until you have set up an actual event. You can add optional notes, for example, the aim of the worship event.

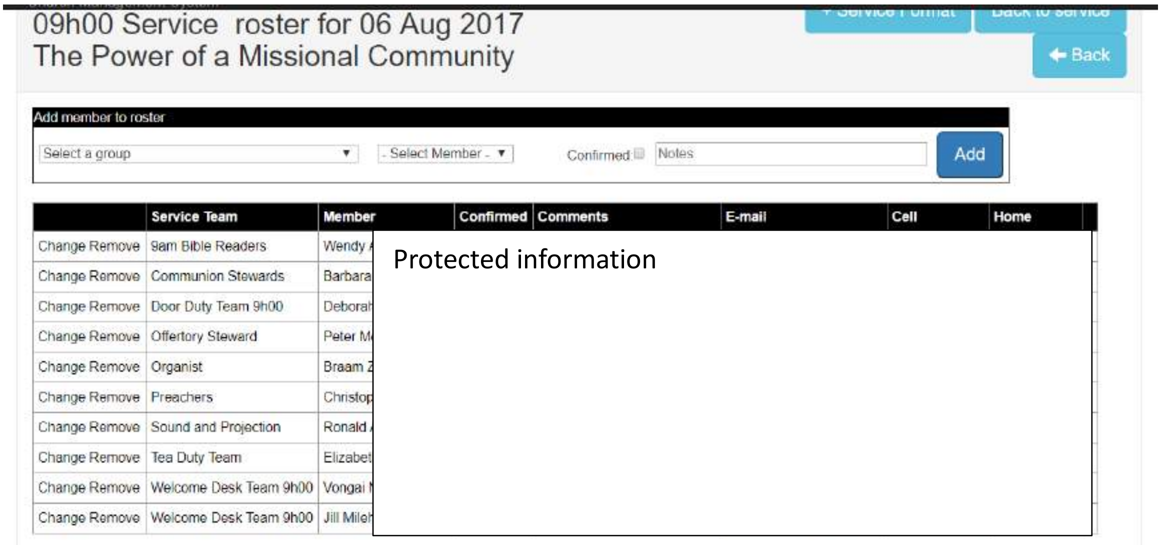
Once you have done a few Rosters, such as for a preaching series, it can look like this:



Click on ‘Make Changes to Service’ to make sure the ‘Day’ and ‘Time’, etc. are correct and save them.

Creating Orders of Worship for Sunday services for your teams

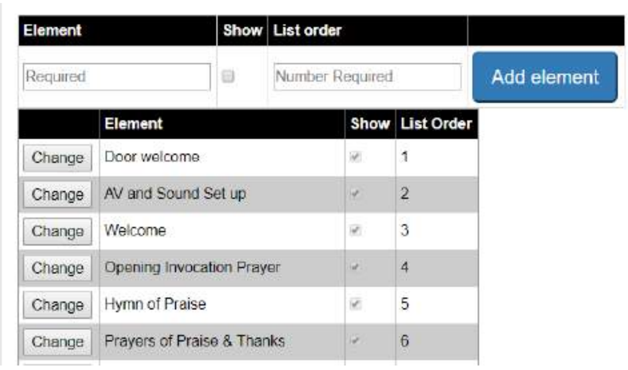
Having the Roster in place you now are ready to select the team so click on ‘Team Members’ and select the group and the member of that group who will be involved on duty for that worship event:



	Service Team	Member	Confirmed	Comments	E-mail	Cell	Home
Change Remove	9am Bible Readers	Wendy					
Change Remove	Communion Stewards	Barbara					
Change Remove	Door Duty Team 9h00	Deborah					
Change Remove	Offertory Steward	Peter M					
Change Remove	Organist	Braam Z					
Change Remove	Preachers	Christop					
Change Remove	Sound and Projection	Ronald					
Change Remove	Tea Duty Team	Elizabet					
Change Remove	Welcome Desk Team 9h00	Vongai					
Change Remove	Welcome Desk Team 9h00	Jill Mile					

Elements of Worship and roles

Then set up an Order of Worship with the elements of the worship, for example:

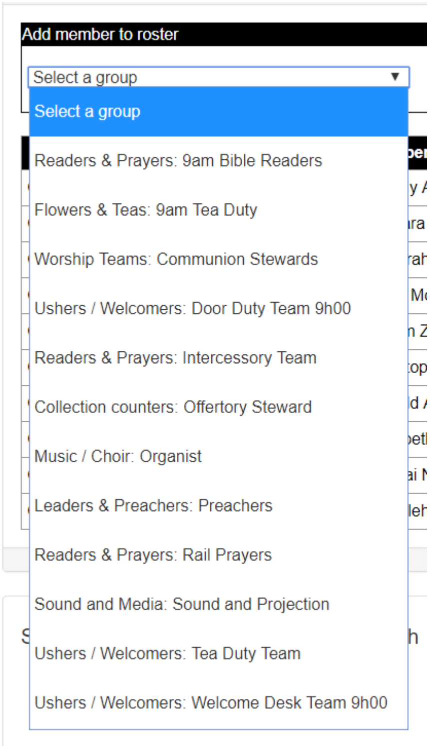


	Element	Show	List Order
Change	Door welcome	✓	1
Change	AV and Sound Set up	✓	2
Change	Welcome	✓	3
Change	Opening Invocation Prayer	✓	4
Change	Hymn of Praise	✓	5
Change	Prayers of Praise & Thanks	✓	6

Note: We recommend using in the list order: 10, 20, 30, etc. so that you can add elements later as 11, 12 and 13, etc,

Then populate with each participant allocated to a role:

You choose the order of the list from 1 upwards which will be the order of the event in the Order of worship. Which then results in something like this:



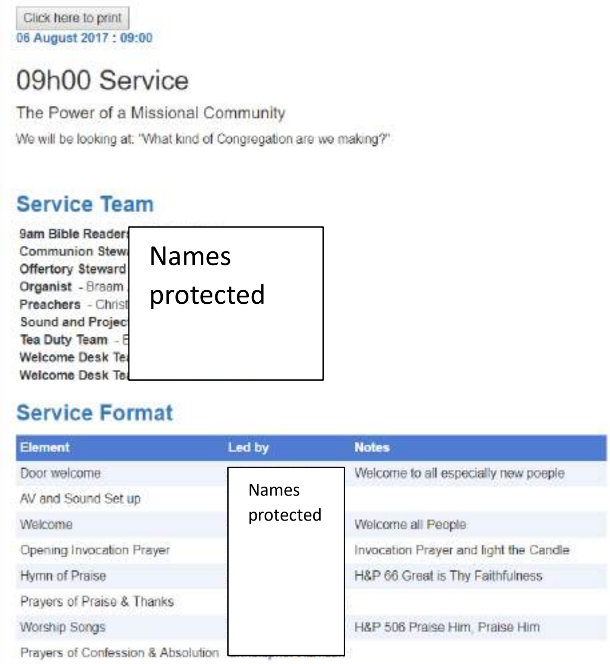
Format or Order of Worship

Click on 'Service Format' to create the Order of Worship, something like this:

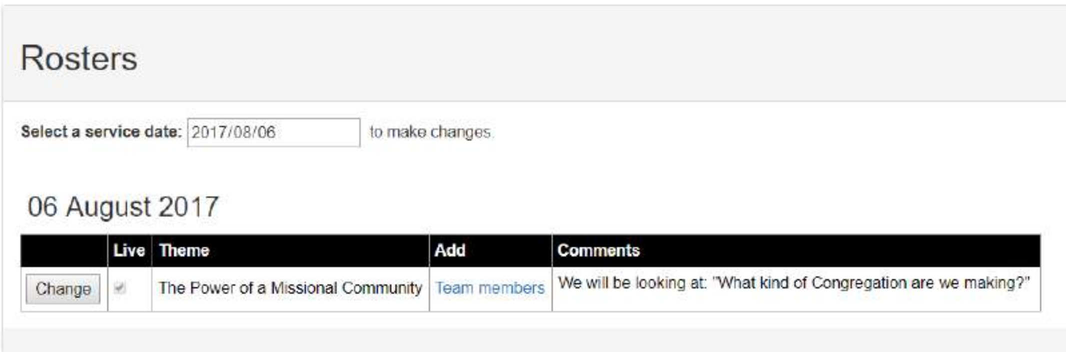
	Element	Led by	Notes
Change Remove	Welcome	Names withheld	Welcome all People
Change Remove	Opening Invocation Prayer		Invocation Prayer
Change Remove	Hymn of Praise		H&P 66 Great is Thy Faithfulness
Change Remove	Prayers of Praise & Thanks		
Change Remove	Worship Songs		H&P 506 Praise Him, Praise Him
Change Remove	Prayers of Confession & Absolution		
Change Remove	The "Our Father..."		Sung
Change Remove	Passing the Peace		
Change Remove	Offertory Hymn		H&P 753 All Praise to our Redeeming Lord
Change Remove	Offertory & Intercession Prayer		Light Peace Candle and prayer by Barbara
Change Remove	Bible Reading 1		1Peter 2:9-10
Change Remove	Bible Reading 2		Acts: 2: 41-47
Change Remove	Message		The Power of a Missional Community
Change Remove	Hymn for Communion		H&P 597 Be known to us in breaking bread
Change Remove	Sacrament of Holy Communion		
Change Remove	Closing Hymn		H&P 785 A charge to keep I have
Change Remove	Benediction		May the Grace

Printing the Order of Worship

You can then print the order by clicking on 'Print':

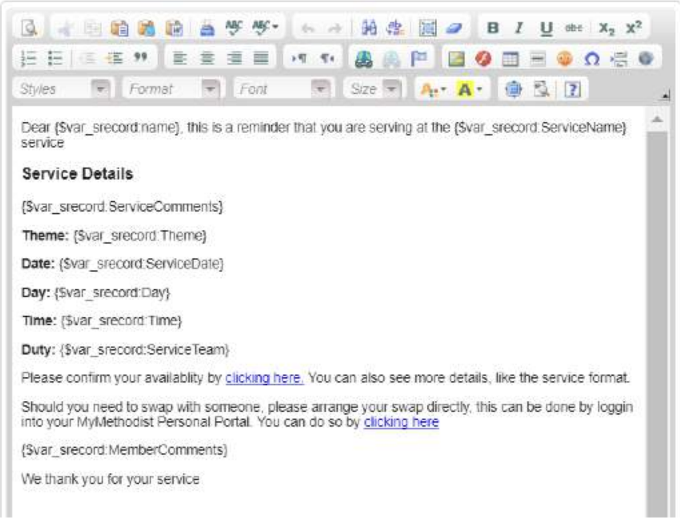


Once you are ready, then 'Go live' then click on 'View – Roster' and choose the date, click 'Change' and tick the Live box:



Then email the team:

Type in any extra information required to tailor-make the message, and send the email:



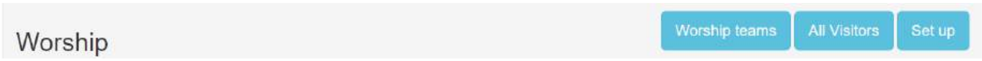
Each person is asked in the email to 'Confirm' their participation by clicking where it is started.

They will be able to swap with another n the team by logging into the System and following the process of requesting another team member to swap.

They will also see the Order of worship and the roles that each person in the team plays.

Setting up and managing the Visitor's follow-up process

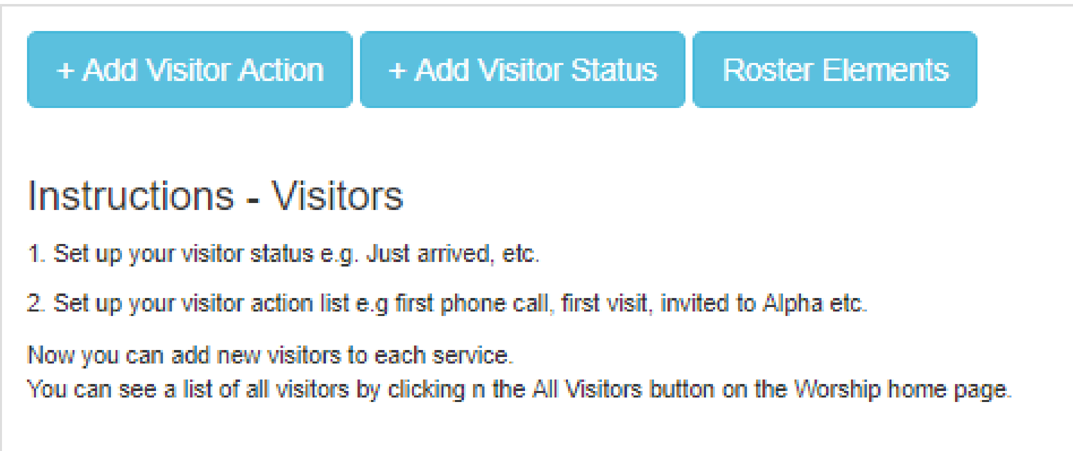
When you open the Worship icon, click on 'Set up':



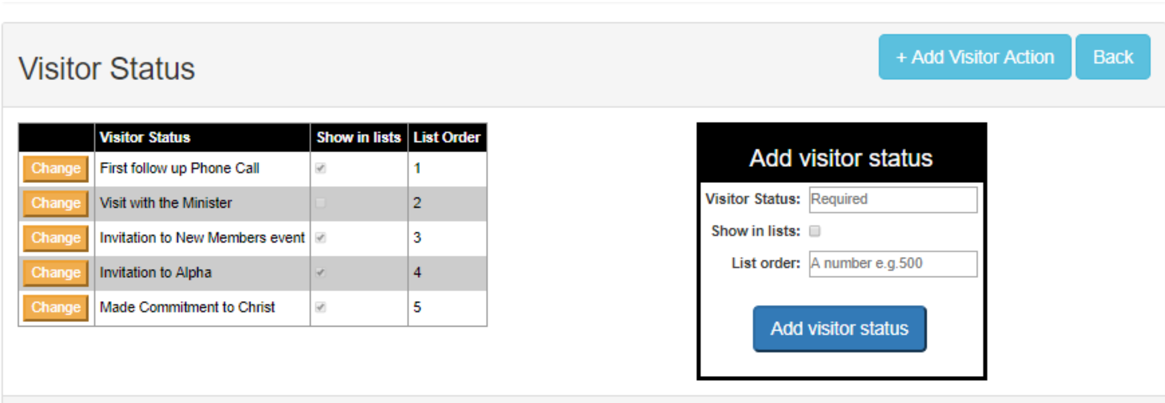
This is where you set up the visitor follow-up process you wish to use.

Purpose: is to give you a facility for you to determine the process that you use to follow-up with new people who connect with you as seekers and who attend a Worship service.

Note: You will need to gain the person's permission to have their names, email and contact details on a Sunday so that you can follow a process of follow-up.



For example:



	Visitor Status	Show in lists	List Order
Change	First follow up Phone Call	✓	1
Change	Visit with the Minister		2
Change	Invitation to New Members event	✓	3
Change	Invitation to Alpha	✓	4
Change	Made Commitment to Christ	✓	5

Once the Visitor Action has been planned, you put people in as visitors and can keep a record of where they are in the assimilation process, for example:

Visitor Name	Position	Status	Action	Service
Friend Friendly (Bestie)		Just arrived	Wecome dinner	Early Service
Bestie Friendly (Mate)	Hello	Just arrived	Attended Alpha Course	Early Service
Friend Friendly (Bud)		Just arrived	Wecome dinner	Early Service
Susan Zaan (sue)		Just arrived	Attended Alpha Course	Early Service

Document Vault

Using the Vault for storing documents

Uses for the Vault:

For example: Storing important documents, like Title Deeds, Insurance Documents, Audited Financial Statements, as well as photos of the facilities, etc.

As an example: Storing Marriage Documents!

Key Question: How does a couple or the local church store a copy of the bar-coded Marriage Register and copy of their Marriage Certificate for easy accessibility? This is particularly important when a marriage officer relocates or retires or is unavailable?

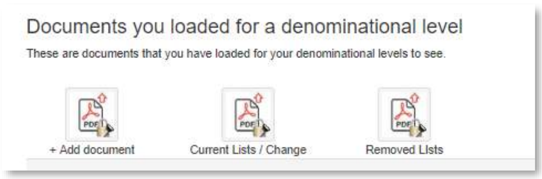
The key issue: Having completed a marriage ceremony, where do we keep the documents for easy future retrieval and reference by key responsible Congregation's Admin person/s and the couple themselves to Access if/when needed? When the minister moves or dies what happens to the documents?

The background: Each marriage officer usually keeps copies of the Marriage Register documents for their records. Where do they save them? (The original and first copy goes to Home Affairs, and the third copy goes to a denominational archive).

The Solution: After each marriage the key documents can be stored in the 'Document Vault' Portal of the congregation where the clergy person was stationed at the time of the wedding. Why there?: Most people, if they cannot get hold of the minister who did the ceremony for the copies, will phone the congregation through which the wedding was arranged.

NOTE: The System is set to save Documents for only the local Church to use and to which they have access for downloading:

and then a second level for all those in that denomination to load, see and download:



To get going:

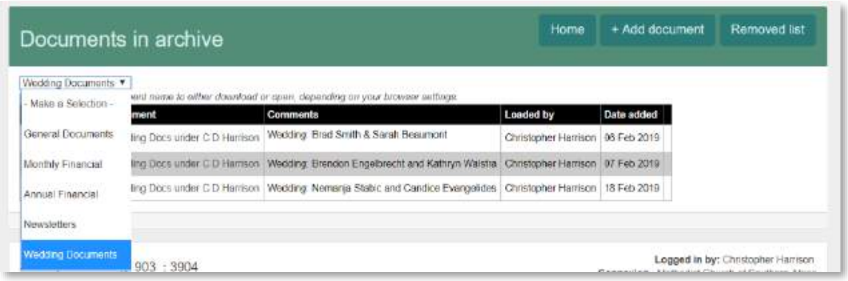
If you are registered on the MyChurch System, log in with your user name (your email address) and your chosen password, as is normal practice, and then Click on the Congregation's Portal.

If you are not registered, or do not have Access to the congregation's Portal, please register through your denominational MyChurch site (www.mychurchit.org and see the links at the bottom of the page) and let us know (via Chris@fresh-bread.co.za or support@mychurchit.org) when done, so we can give you Access.

<u>Step 1</u>: In the Congregation's Portal, click on the 'Document Vault':

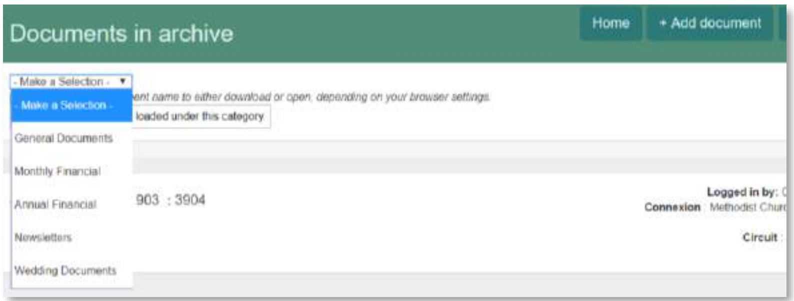
<u>Step 2</u>: We are saving a document for viewing by only the local Church team, we go to 'Archive documents for your Church' and click on '+Add document'. This will appear:

Step 3: This is where the Pdf is inserted as an attachment, type the Title of the file, name where you wish to save it, in this case it is 'Wedding Documents', make a comment on the file as to the contents, and save the document:



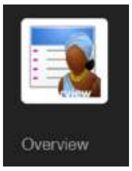
Step 4: You can check that it is all saved, by going to the 'Current List' or in 'Lists / change':

And select the list: 'Wedding Documents':

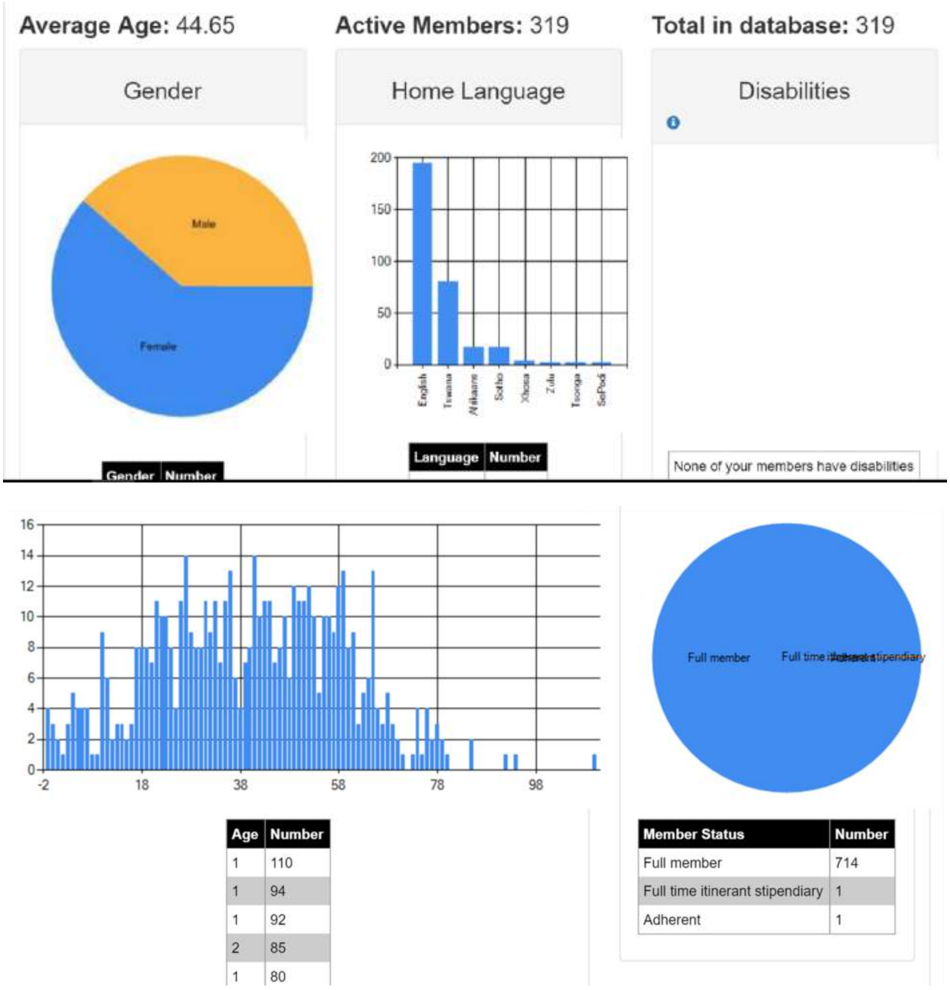


This applies to all documents saved in the Vault.

Overview

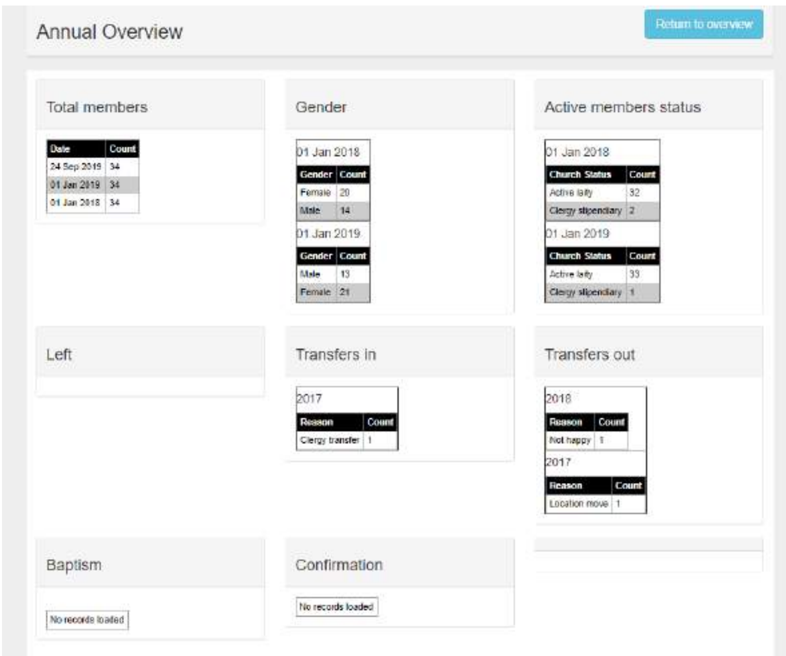


This section is to give you the general statistics and overall summary of the membership of the congregation or region (gender, Active members, Ages, relationship status, disabilities, residential) areas):

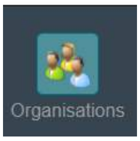


These graphs and statistics are live, and so reflect the immediate situation. They can assist with reports to various bodies that require this, for decision making and leadership strategy.

Under the 'Annual Overview' you will see the statistics for annual reports: for e.g.:



Organizations: See ‘Organisations Portal’ in Section 9

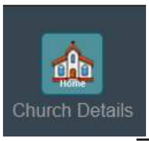


The church office, or persons with congregational Access, connects their members to their denomination’s existing and recognised Organisations. (See Organization’s Portal for more about that).

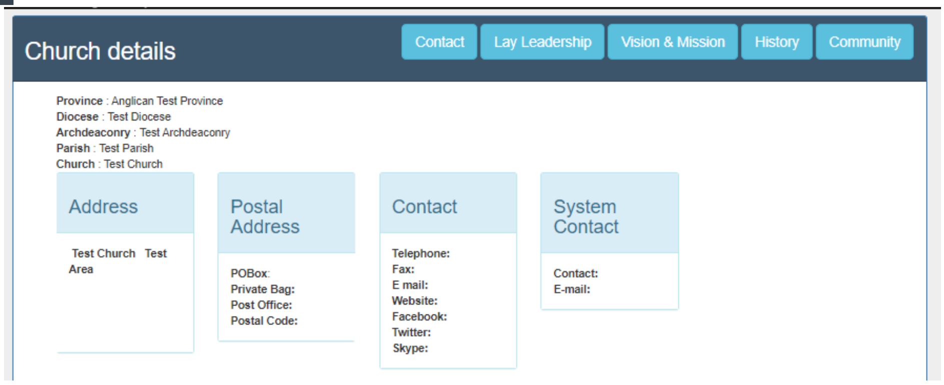
Events: See the ‘Events Portal’ in Section 10

This portal gives opportunity to create and manage an event, form a Youth Camp to a Conference by managing the sign-ups, registrations, to the payments.

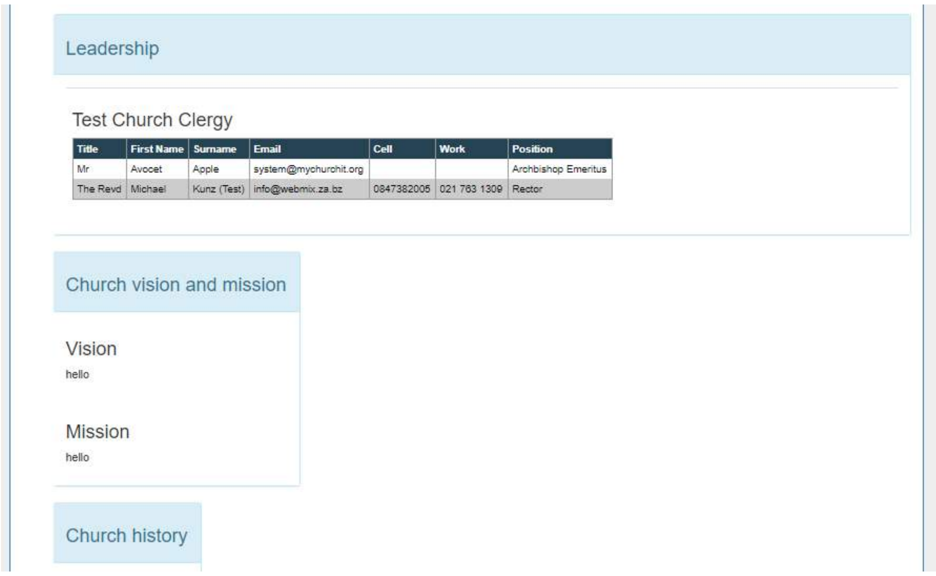
Church Details



This is where the important information is kept of the congregation’s physical location, addresses, email, website and contacts details, etc. Click on ‘**Contact**’ to edit and add information:



It very important to complete this so that records can be kept of the history of the Congregation for future generations, like the ministers who served there.



System email:

This is for the Church Administrator or Membership Secretary and needs an email address to which to send membership related notifications. For example, if a person registers to join your congregation then the system will inform you automatically of this notification.

Admin email:

This is for the person responsible for the system in the church for notifications from the system developers. For example, an email is for regarding changes to the system and when it may be down for updates, etc. Please make sure you put in the System Administrator (Church Secretary) details so we can remain in contact with them with particular messages that pertain to your congregation.

The two above may be the same person.

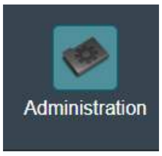
Section 3: Groups

One of the amazing things about the system is its versatility through the Groups system. We have set up some, and we can add to this as needed.

The Purpose of this section called Groups is to give you the opportunity to shape the way that you manage the church. A person in the group can connect with the others in that group

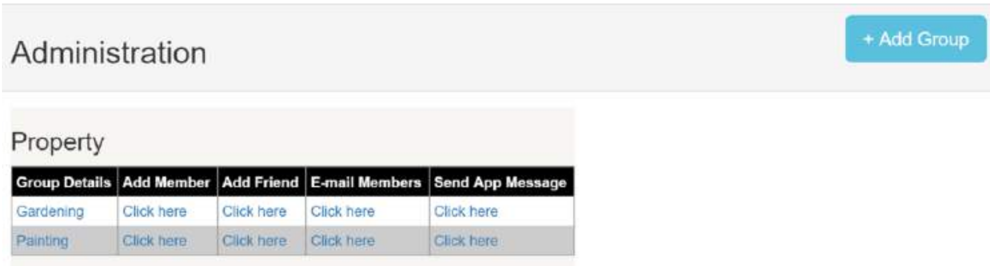
IMPORTANT: PLEASE DO NOT create a group here for a **recognised Denominational Organization** in this section/Portal. There is a separate and specific Organizations Portal specifically designed for the needs, requirements and nature of those specific organizations.

Administration



In each section, there are a variety for options for you to create groups and then populate them with the people you wish to have in the group.

For example: Under Administration, click on +Add Group and give the new group a name:



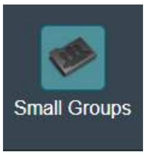
Once a group has been formed, members can be added. Those who are registered on the system can be added under 'Add Member', and people who not registered can be added under 'Add Friend'.

Emails and/or Messages then can be sent to the group using the E-mail Members and Send Messages for those people who have registered in the system and who have Subscribed to the messaging System and have logged in.

Gifting

You can choose to set up either Occupational Gifting or Spiritual Gifting groups and populate them.

Small Groups



There are different names for small groups in the life of a church and you can select which to use, or a combination of these.

Click on the '+Add Group' and select under which section the group is to be formed, give a name to the group and save it. For example:

Bible Study Group

Group Details	Add Member	Add Friend	E-mail Members	Send App Message
Demetris Group	Click here	Click here	Click here	Click here

Cell Group

Group Details	Add Member	Add Friend	E-mail Members	Send App Message
David's Group	Click here	Click here	Click here	Click here

Home Group

Group Details	Add Member	Add Friend	E-mail Members	Send App Message
Mandy's Group	Click here	Click here	Click here	Click here

You can then populate these with the members of each group and they can then communicate within those groups via an email and/or the messaging system.

Special Groups

In this is section you can create groups for purpose of ministry, like Leader's Meeting, Elders' Meeting, Men's Groups, Women's Groups. For example:

Special Groups

Group Details	Add Member	Add Friend	E-mail Members	Send App Message
Leaders Meeting	Click here	Click here	Click here	Click here
Society Stewards	Click here	Click here	Click here	Click here
YMG	Click here	Click here	Click here	Click here

When you click on this icon, some options come up and you can populate the area with the names of the people from your congregation.

Teaching and Training

This is a helpful tool to track the discipleship development our people. For instance, create an Alpha group and populate this with those who have attended Alpha.

When you click on this icon, some options come up and you can populate the area with the names of the people from your congregation. There are extra blocks and tick boxes that can be used for anything the church wants to add.

Note: By adding a member of a group and giving them 'Access' to that group, this only allows them to see that particular group. They use the feature for the benefit of that group, but without being able to see the rest of the church portal for security reasons.

Worship Teams

This is covered in another section. Within this icon you can form the various teams that enable the worship services and events. (See 'To Set up a Church Worship Service' above)

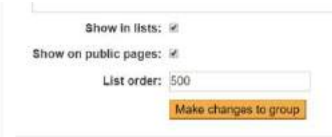
You can then populate these, and they can communicate within those groups via an email and/or the messaging system.

Changing the name of the Group

If there is a change to the name of the group then click on the name of the group.

Then click on 'Make Changes' and make the necessary changes.

Then click on 'Make changes to the group':



Changing or deleting the membership of the group

Click on the name. Make the required changes (e.g. giving access to that group, changing the spelling, or deleting the person from that group, etc.)

Then click the relevant instruction:

Section 4: The Financial Portal

(This section was written by a Chartered Accountant and is updated by our Development Team)

Stewardship

The church giving plug-in will result in members been able to track their giving through the personal portal. This will have a positive effect in encouraging members to fulfil their promises to the church, resulting in an increase of income.

The plug-in for Parish/Congregation and Diocesan/District assessment will be helpful for record keeping.

NOTE: Wherever you see the word PLEDGE it includes a TITHE.

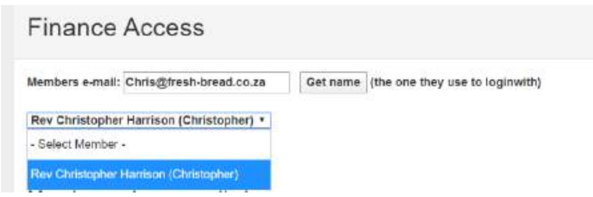
Access to the Finance Portal:

Access is given at the Finance Portal is given to those who have authority to input and change the financial data on the system, namely the clergy and the church administrators and/or leaders. The system's administrator will give the key person Access, and they in turn can give and remove access from people.

Only a person who is on the system and has completed the Registration process will be eligible to be given this kind of congregational access.

Go to 'Grant/Remove Access' in the Member's Portal. There are three areas where Access needs to be given and each is only for that section:

Click on Finance and insert the person's email address and then select the particular person: e.g.:



Then click on "Grant Access to Financial Portal:

A list of those who have Access to this portal is shown so you can manage who has access and for easy removal of access when appropriate.

<u>Please remember that this information is ONLY valid for members older than 16.</u>

Home | First : Add Pledge Number | Second : Add Pledge | Amend Pledge | Add Cash Pledge | Add Bank Pledge | Members Contributions | Pledge Overview

Cash Book | Bank account | Petty Cash Book | Budget | Extra Bank Accounts | Extra Petty Cash Books | + Add Extra Book

Income and Expenses by Date | Income and Expenses by Financial Year

Giving by fixed amount | Giving by percentage (Used only by the Caribbean)

Pledges

Home | First : Add Pledge Number | Second : Add Pledge | Amend Pledge | Add Cash Pledge | Add Bank Pledge | Members Contributions | Pledge Overview

a. <u>Add Pledge Number</u>

NB: Every person that makes a Pledge **<u>MUST</u>** have a pledge number and it is recommended that the member's System number be used as the Pledge number. This is to link the details for the member in a more efficient manner. If you do not know the member's system number, then go to the member details and write it down.

ALSO seen here circled in red is why it is best to use the member's system number as the pledge number. ONE PLEDGE NUMBER PER PERSON. Not one pledge number per family. DO NOT create a pledge number for every family member when ONLY one person will be paying the contribution.

3160	No number	No pledge	0	0	0	0	0	0	0	0	0	0	0	0
3166	No number	No pledge	0	0	0	0	0	0	0	0	0	0	0	0
3168	No number	No pledge	0	0	0	0	0	0	0	0	0	0	0	0
3169	513	No pledge	0	0	0	0	0	0	0	0	0	0	0	0
3171	No number	No pledge	0	0	0	0	0	0	0	0	0	0	0	0
3172	071	No pledge	0	0	0	0	0	0	0	0	0	0	0	0
3173	No number	No pledge	0	0	0	0	0	0	0	0	0	0	0	0
3215	594	No pledge	0	0	600	0	0	0	0	0	400	0	0	500
3216	493	No pledge	0	0	600	400	0	0	0	0	400	300	0	500
3217	No number	No pledge	0	0	0	0	0	0	0	0	0	0	0	0
3218	235	No pledge	0	0	0	100	0	0	0	0	0	0	0	0
3353	422	No pledge	0	1,200	1,200	1,350	1,350	0	2,700	0	1,300	0	0	1,000
3617	No number	No pledge	0	0	0	0	0	0	0	0	20	0	20	0
3618	223	No pledge	0	0	0	100	0	0	0	100	100	100	100	100
3619	223	No pledge	0	0	60	0	0	0	50	0	0	0	0	0
3620	No number	No pledge	0	0	0	0	0	0	0	0	0	0	0	0
3628	No number	No pledge	0	0	0	0	0	0	0	0	0	0	0	0
3630	No number	No pledge	0	0	0	0	0	0	0	0	0	0	0	0

First : Add Pledge Number

It is HIGHLY recommended to use the MEMBER'S SYSTEM NUMBER as his/her pledge number. In some cases this is not an option. So you can link existing pledge numbers to the member's system number here,

Member: Ackerman, Paul (Mr)

Pledge Number:

Add member's pledge number

Select the member's name from the drop-down list.

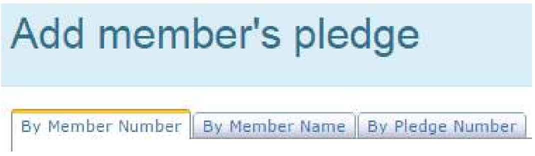
Enter the member's pledge number.

Select "Add member's pledge member".

This will add the member and his pledge number to the system for further processing.

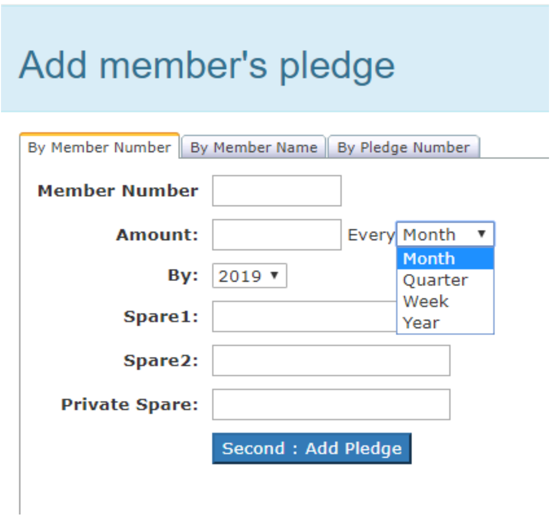
b. <u>Add Pledge</u>

(There are three options here and if you have created a pledge number with the system member number it makes it easier from here on because almost everything is about the pledge number)



i. By member number
ii. By member name
iii. By pledge number

b.1 Record by member number



Enter the member's My Church number in "Member no".

Enter the amount pledged "Amount".

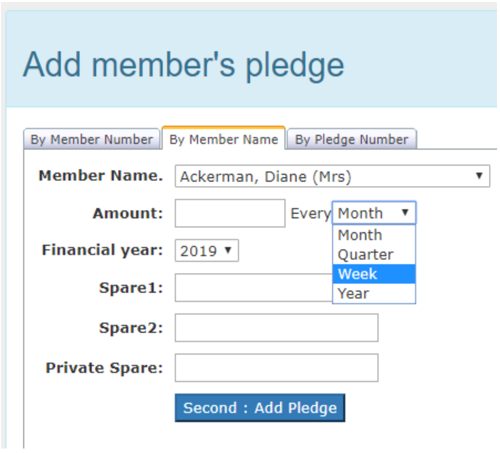
Select from the drop-down menu if the pledge is every "Year", "Month", "Quarter" or "Week".

Select from the drop-down menu the financial year to which the pledge relates.

Additional comments can be added in "Spare 1", "Spare 2" or "Private Spare".

Select "Add Pledge".

b.2 Record by member name



Select “Member name” from the drop-down list.

Enter the amount pledged “Amount”.

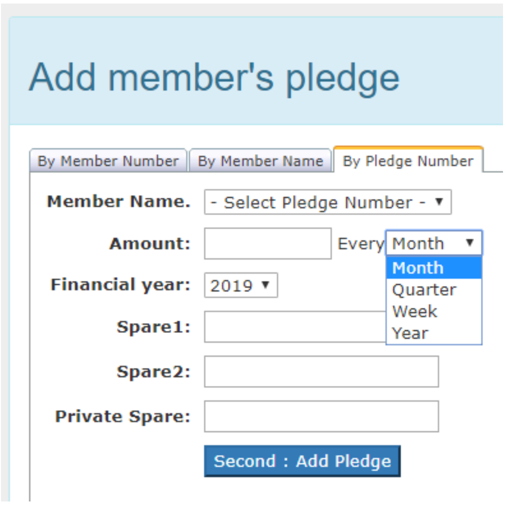
Select from the drop-down menu if the pledge is every “Year”, “Month”, “Quarter” or “Week”.

Select from the drop-down menu the financial year to which the pledge relates.

Additional comments can be added in “Spare 1”, “Spare 2” or “Private Spare”.

Select “Add Pledge”.

b.3 Record by pledge number



Select the “Pledge number” from the drop-down list.

Enter the amount pledged “Amount”.

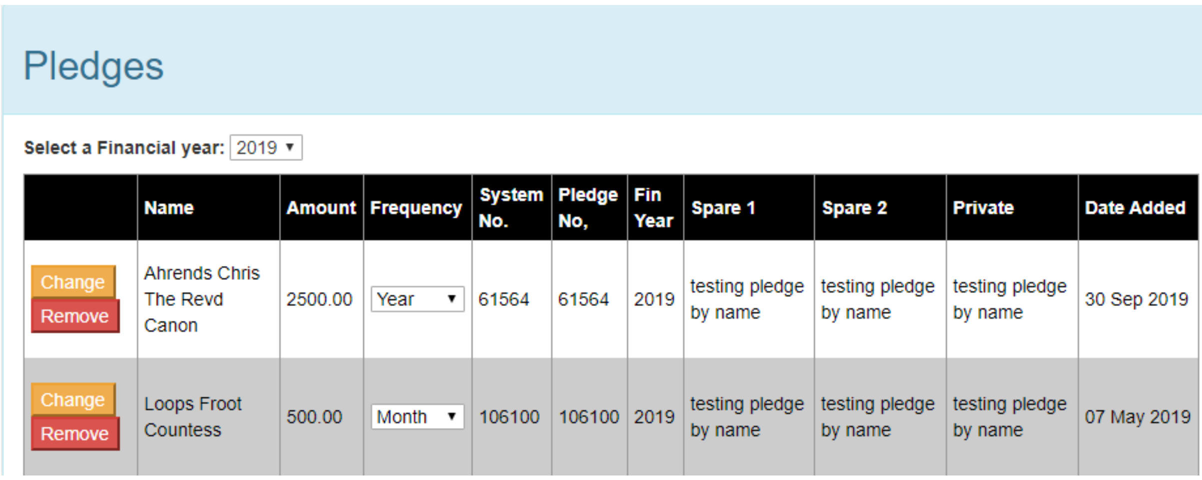
Select from the drop-down menu if the pledge is every “Year”, “Month”, “Quarter” or “Week”.

Select from the drop-down menu the financial year to which the pledge relates.

Additional comments can be added in “Spare 1”, “Spare 2” or “Private Spare”.

Select “Add Pledge”.

c. <u>Pledges</u>



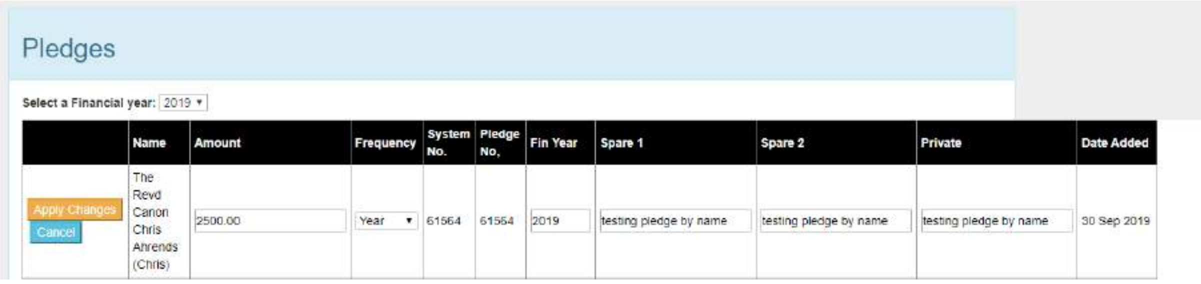
Pledges

Select a Financial year: 2019

	Name	Amount	Frequency	System No.	Pledge No,	Fin Year	Spare 1	Spare 2	Private	Date Added
Change Remove	Ahrends Chris The Revd Canon	2500.00	Year	61564	61564	2019	testing pledge by name	testing pledge by name	testing pledge by name	30 Sep 2019
Change Remove	Loops Froot Countess	500.00	Month	106100	106100	2019	testing pledge by name	testing pledge by name	testing pledge by name	07 May 2019

The Pledges will display the consolidated pledges entered for each financial year. Any pledge entered can be changed or deleted by selecting either “Change” or “Remove”.

c.1 Change

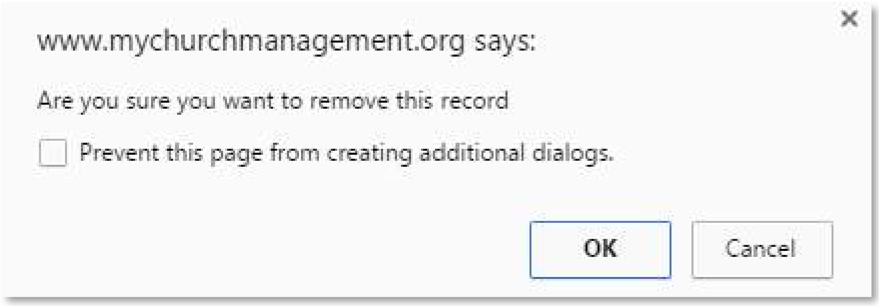


Changes can be made to “Amount”, “Frequency”, “Fin year”, “Spare 1”, “Spare 2” and “Private”

Select “Apply Change” to make the changes or “Cancel” to discharge any changes.

c.2 Remove

Select “Remove” to remove the record.



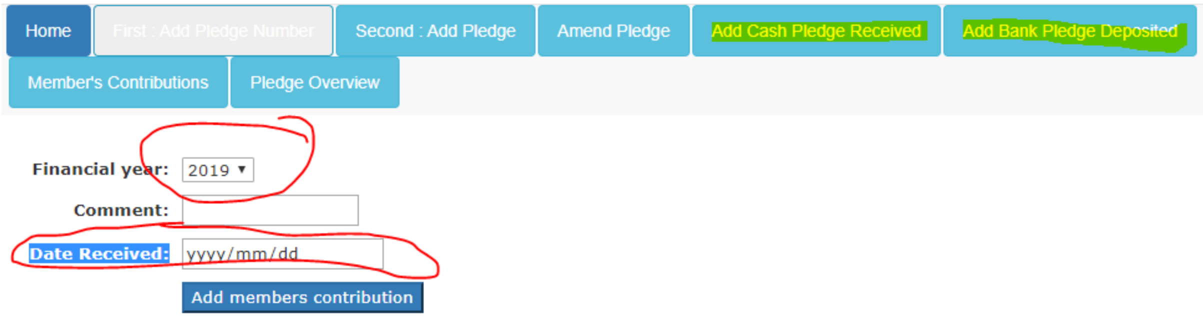
d. <u>Add cash Pledge</u>

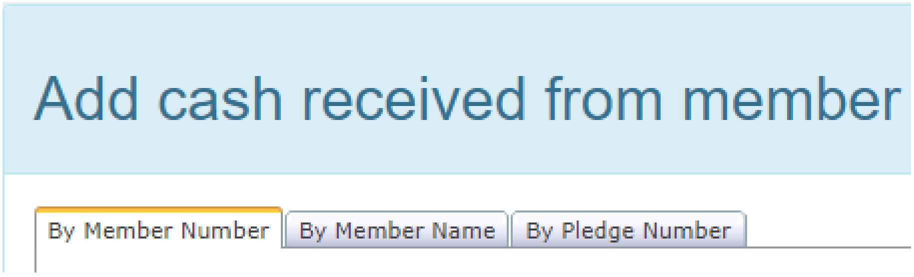
This is for when the member who has Pledged a contribution gives you (the church Administrator) CASH.

The information recorded in the cash Pledge will automatically be recorded in the Cash Book. To record Pledges received in cash, there are three options available:

<u>NOW PLEASE TAKE NOTE OF THIS FOR ALL AMOUNTS RECEIVED FOR PLEDGES FROM MEMBERS.</u>

The system has been written to record a pledge for the current year. That is to say from JANUARY to DECEMBER of the current year which is deemed to be the current FINANCIAL year. The FIRST amount received MUST ALWAYS be recorded has having been received in January or the Overview will not work correctly and the amount received by Financial year will also be out. This is being looked into but if you follow this simple request all will be correct, and we will all be happy.
Let me give an example. A person decided in July to pledge R100 for 12 months. The pledge will be recorded as frequency of 12 but will only be accounted for until December of the current year. It Does Not overflow to the next year. This must be recorded as the same in the NEXT year. The first amount received, i.e. the one received in July, MUST be recorded as having been received in January. There is a DATE RECEIVED box that allows you to change the date the pledge was received. The Financial year and the year of the date received must ALWAYS be the same…… This is for both Cash and Bank deposits…



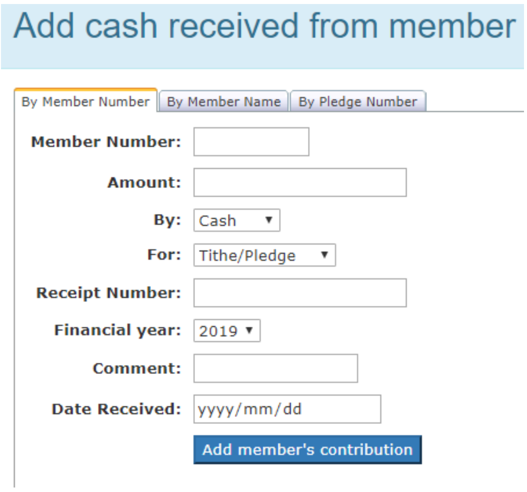


i. By member number

ii. By member name

iii. By pledge number

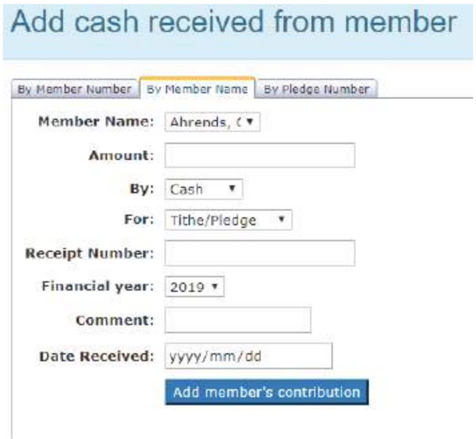
d.1 Record by member number



Enter the member's My Church number in "Member no".
Enter the amount received "Amount".
Select the manner in which the pledge was received "Cash" or "Cheque" from the drop-down menu.
Select from the drop-down menu what the pledge was received for "Pledge", "Gift" or "Special Project".
Enter the receipt number.
Select the financial year which the pledge relates to.
Include any comments that relate to the entry you are recording that could be useful to others i.e. preparers of financial statements, and Auditors, in the "Comments" column.
Select the date from the calendar.
Select "Add member's contribution".

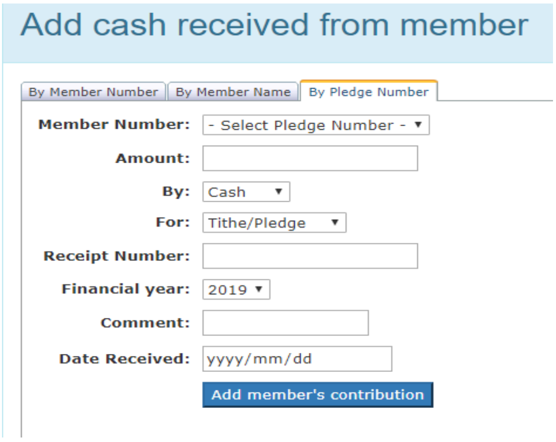
d.2 Record by member name

Select the member's name from the drop-down menu.



Enter the amount received "Amount".
Select the manner in which the pledge was received "Cash" or "Cheque" from the drop-down menu.
Select from the drop-down menu what the pledge was received for "Pledge", "Gift" or "Special Project".
Enter the receipt number.
Select the financial year which the pledge relates to.
Include any comments that relate to the entry you are recording that could be useful to others i.e. preparers of financial statements, and Auditors, in the "Comments" column.
Select the date from the calendar.
Select "Add member's contribution".

d.3 Record by pledge number



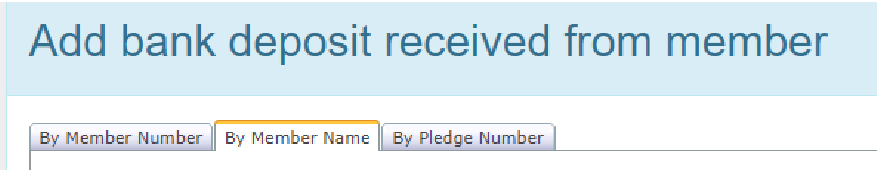
Select the member's pledge number from the drop-down menu.
Enter the amount received "Amount".
Select the manner in which the pledge was received "Cash" or "Cheque" from the drop-down menu.
Select from the drop-down menu what the pledge was received for "Pledge", "Gift" or "Special Project".
Enter the receipt number.
Select the financial year which the pledge relates to.
Include any comments that relate to the entry you are recording that could be useful to others i.e. preparers of financial statements, and Auditors, in the "Comments" column.
Select the date from the calendar.
Select "Add member's contribution".

e. Add bank Pledge

This is for when the member who has Pledged a contribution deposits the amount received into the church's bank account.

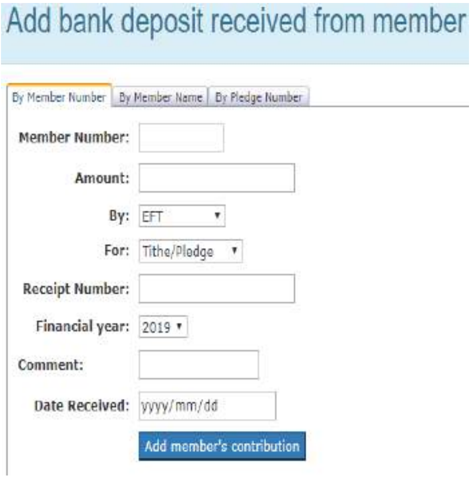
NOW PLEASE TAKE NOTE OF THIS FOR ALL AMOUNTS RECEIVED FOR PLEDGES FROM MEMBERS.

The system has been written to record a pledge for the current year. That is to say from JANUARY to DECEMBER of the current year which is deemed to be the current FINANCIAL year. The FIRST amount received MUST ALWAYS be recorded has having been received in January or the Overview will not work correctly and the amount received by Financial year will also be out. This is being looked into but if you follow this simple request all will be correct, and we will all be happy.
The information recorded in the cash pledge will automatically be recorded in the Bank Account on the system to make it easier to reconcile the bank account. To record pledges received in the bank account there are three options available:



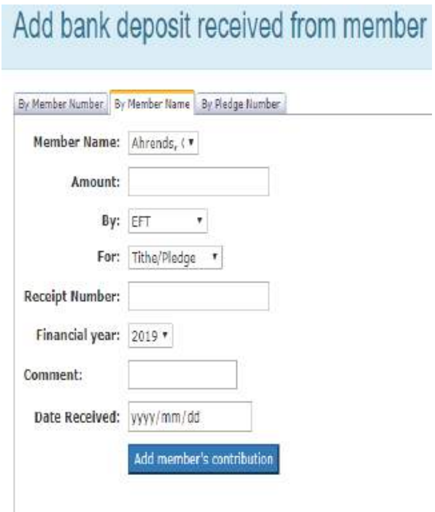
i. By member number
ii. By member name
iii. By pledge number

e.1 By member number



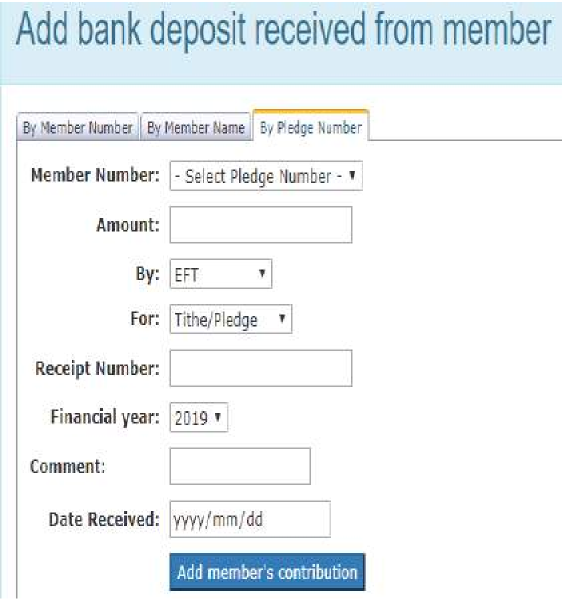
Enter the member’s My Church number in “Member no”.
Enter the amount received “Amount”.
Select the manner in which the pledge was received “EFT”, “Credit Card” or “Debit Order” from the drop-down menu.
Select from the drop-down menu what the pledge was received for “Pledge”, “Gift” or “Special Project”.
Enter the receipt number.
Select the financial year which the pledge relates to.
Include any comments that relate to the entry you are recording that could be useful to others i.e. preparers of financial statements, and Auditors, in the “Comments” column.
Select the date from the calendar.
Select “Add member’s contribution”.

e.2 By member name



Select the member’s name from the drop-down menu
Enter the amount received “Amount”
Select the way the pledge was received “EFT”, “Credit Card” or “Debit Order” from the drop-down menu
Select from the drop-down menu what the pledge was received for “pledge”, “Gift” or “Special Project”.
Enter the receipt number
Select the financial year which the pledge relates to
Include any comments that relate to the entry you are recording that could be useful to others i.e. preparers of financial statements, and Auditors, in the “Comments” column.
Select the date from the calendar.
Select “Add member’s contribution”

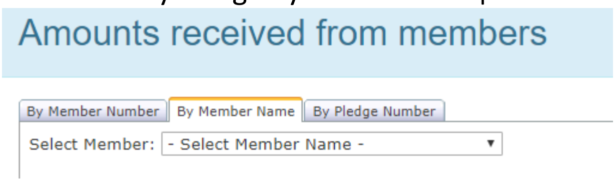
e.3 By pledge number



Select the member's pledge number from the drop-down menu
Enter the amount received "Amount"
Select the manner in which the pledge was received "EFT", "Credit Card" or "Debit Order" from the drop-down menu
Select from the drop-down menu what the pledge was received for "Pledge", "Gift" or "Special Project".
Enter the receipt number
Select the financial year which the pledge relates to
Include any comments that relate to the entry you are recording that could be useful to others i.e. preparers of financial statements, and Auditors, in the "Comments" column.
Select the date from the calendar.
Select "Add member's contribution"

f. <u>Member's Contribution</u>

Member's Contribution is available on member's profile. This will show information on what the member has pledged and what the member has paid as recorded against said pledge. This will be shown for EACH financial year that has been recorded on the system.
The information can be accessed by using any of the three options available:



i. Member Number
ii. Member Name
iii. Pledge Number

Member's Contributions

By Member Number | By Member Name | By Pledge Number

106100 Get contribution details

Countess Froot Loops (Froot)

2019

Pledge Amount: 6000.00

500.00 , Month
Spare 1: testing pledge by name
Spare 2: testing pledge by name
Private Spare: testing pledge by name

Total for	Contribution
Amount Received from Pledgers	6250.00

Breakdown of payments

Date	Account	Contribution	By	Comment	Added By
01 Jan 2019	Amount Received from Pledgers	500.00	Cash	Cash paid to Administrator	Michael
24 Jan 2019	Amount Received from Pledgers	500.00	Cash	Cash paid to Administrator	Michael
01 Feb 2019	Amount Received from Pledgers	500.00	Cash	Cash paid to Administrator	Michael
01 Feb 2019	Amount Received from Pledgers	250.00	Credit Card	testing update	Michael
25 Feb 2019	Amount Received from Pledgers	500.00	Cash	Gave cash to Admin.	Michael
28 Feb 2019	Amount Received from Pledgers	150.00	Cash	testing update	Michael
28 Feb 2019	Amount Received from Pledgers	500.00	Credit Card	emailed proof of payment.	Michael
28 Feb 2019	Amount Received from Pledgers	500.00	Credit Card	received proof of payment by email	Michael
01 Mar 2019	Amount Received from Pledgers	500.00	Cash	Gave cash to Admin.	Michael
01 Apr 2019	Amount Received from Pledgers	500.00	EFT	emailed proof of payment.	Michael
12 Apr 2019	Amount Received from Pledgers	50.00	Cash	testing name update	Michael

g. Pledge overview

This is where the system gets lost and confused if you do not capture the first amount received in the January of the financial year. Each year after that will be out as it will assume that the financial year has not been completed.

The system uses the current year as the financial year when recoding the amounts received.

Here is an example of what I mean. NO PLEDGES have been made for 2019 but because the amounts received from members from 2016 did not have the first amount received from members recorded as January the pledges and amounts received from members were carried over each year to the current financial year.

Pledge Overview

Download Pledges addresses

Download Pledge numbers addresses

Select a Financial year: 2019

Totals of Amounts Received from Pledgers.

Note: The Monthly Average is the average of the pledges by members. The months have the pledge totals received from the members.

Monthly Average	January	February	March	April	May	June	July	August	September	October	November	December
908	1,800	2,400	500	850	500	1,000	0	0	0	0	976	0

Pledge Difference

January	February	March	April	May	June	July	August	September	October	November	December
892	1,492	-408	-58	-408	92	-908	-908	-908	-908	68	-908

Member Pledges and Amounts Received

Note: Only shows member's older than 16. Look through all the numbers, people giving without having a pledge recorded are also there. | Hint: You can sort by clicking on the headings as well.

Member Number	Pledge Number	Pledge	Frequency	January	February	March	April	May	June	July	August	September	October	November	December
85263	85263	**200**	Month	0	0	0	0	0	0	0	0	0	0	0	0
105100	105100	**500**	Month	1,000	2,400	500	850	500	1,000	0	0	0	0	976	0
19502	No number		No pledge	0	0	0	0	0	0	0	0	0	0	0	0
79196	No number		No pledge	0	0	0	0	0	0	0	0	0	0	0	0
105584	No number		No pledge	0	0	0	0	0	0	0	0	0	0	0	0

These highlighted in Yellow is what I am referring to. ALSO seen here circled in red is why it is best to use the member's system number as the pledge number. ONE PLEDGE NUMBER PER PERSON. Not one pledge number per family. DO not create a pledge number for every family member when ONLY one person will be paying the contribution.

3160	No number		No pledge	0	0	0	0	0	0	0	0	0	0	0	0
3166	No number		No pledge	0	0	0	0	0	0	0	0	0	0	0	0
3168	No number		No pledge	0	0	0	0	0	0	0	0	0	0	0	0
3169	513		No pledge	0	0	0	0	0	0	0	0	0	0	0	0
3171	No number		No pledge	0	0	0	0	0	0	0	0	0	0	0	0
3172	071		No pledge	0	0	0	0	0	0	0	0	0	0	0	0
3173	No number		No pledge	0	0	0	0	0	0	0	0	0	0	0	0
3215	594		No pledge	0	0	600	0	0	0	0	0	400	0	0	500
3216	493		No pledge	0	0	600	400	0	0	0	0	400	300	0	500
3217	No number		No pledge	0	0	0	0	0	0	0	0	0	0	0	0
3218	235		No pledge	0	0	0	100	0	0	0	0	0	0	0	0
3353	422		No pledge	0	1,200	1,200	1,350	1,350	0	2,700	0	1,300	0	0	1,000
3617	No number		No pledge	0	0	0	0	0	0	0	0	20	0	20	0
3618	223		No pledge	0	0	0	100	0	0	0	100	100	100	100	100
3619	223		No pledge	0	0	60	0	0	0	50	0	0	0	0	0
3620	No number		No pledge	0	0	0	0	0	0	0	0	0	0	0	0
3628	No number		No pledge	0	0	0	0	0	0	0	0	0	0	0	0
3630	No number		No pledge	0	0	0	0	0	0	0	0	0	0	0	0

Now for the true reflection of what should be displayed.

Pledge Overview

Download Pledges addresses

Download Pledge numbers addresses

Select a Financial year: 2019

Totals of Amounts Received from Pledgers.

Note: The Monthly Average is the average of the pledges by members. The months have the pledge totals received from the members.

Monthly Average	January	February	March	April	May	June	July	August	September	October	November	December
908	1,800	2,400	500	850	500	1,000	0	0	0	0	0	0

Pledge Difference

January	February	March	April	May	June	July	August	September	October	November	December
892	1,492	-408	-58	-408	92	-908	-908	-908	-908	-908	-908

Member Pledges and Payments

Note: Only shows member's older than 16. Look through all the numbers, people giving without having a pledge recorded are also there. | Hint: You can sort by clicking on the headings as well.

Member Number	Pledge Number	Pledge	Frequency	January	February	March	April	May	June	July	August	September	October	November	December
85263	85263	200	Month	0	0	0	0	0	0	0	0	0	0	0	0
106100	106100	500	Month	1,000	2,400	500	850	500	1,000	0	0	0	0	0	0
19502	No number		No pledge	0	0	0	0	0	0	0	0	0	0	0	0

Pledge overview allows for review of:

Totals of Amounts Received from Pledgers: Totals of all the amounts received in a financial year, when captured by using the options of "Add Cash Pledge Received" or "Add Bank Pledge Deposited".

Pledge difference: The monthly difference between the amounts pledged and amounts received.

Member's pledges: List the members per number, the annual pledged amount, the frequency and the actual monthly amount received.

<u>Pledge overview Addresses.</u>

This option will download the address information of all the members who have made a pledge for the current financial year. No monetary value is exported.

Pledge Overview

Download Pledges addresses

Download Pledge numbers addresses

As in:

Member Id	Pledge Number	Title	Firts Name	Surname	Preferred Name	Address 1	Address 2	Suburb	Postal Code	City	PO Box	PO Extra	PO Postal Code	PO Post Office	Age	Title, First and Surname	Pledge Year
106100	106100	Countess	Froot	Loops	Froot	xxx				xxx					91	Countess Froot Loops	2019

Pledge Overview

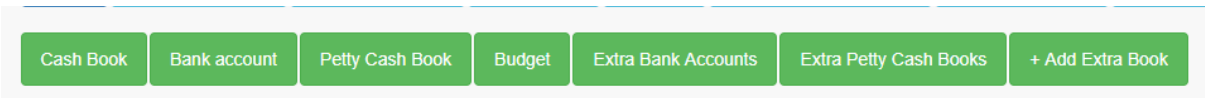
Download Pledges addresses

Download Pledge numbers addresses

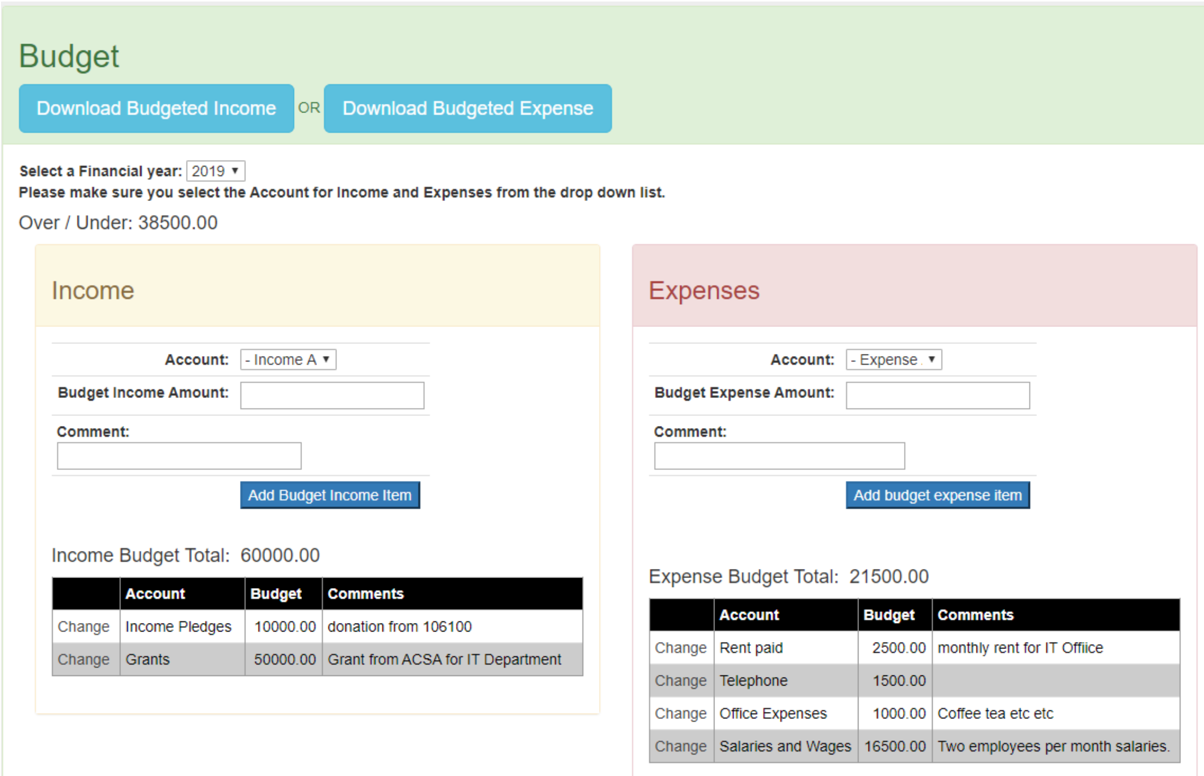
As in:

1	MemberId	PledgeNumber	Title	FirstName	Surname	Preferred	Address1	Address2	Suburb	PostalCod	City	POBox	POExtra	POPostalC	POPostOf	Age	TitleFirstS	year
2	106100	106100	Countess	Froot	Loops	Froot	xxx				xxx					91	Countess	2019
3	19502	No number	The Revd	Michael	Kunz (Test	Mike	23 Brent R		Plumstead	7800	Cape Tow					51	The Revd	2019
4	61564	No number	The Revd	Chris	Ahrends	Chris	12 Ludlow		Cape Tow	8001	Cape Tow					64	The Revd	2019
5	79196	No number	Mr	Ewald	van der W	Ewald	3 Bottle Br	Protea Va	Bellville	7500	Caope Tov					74	Mr Ewald	2019
6	85263	No number	Mr	Test 2 Firs	Test 2 Sur	Preferred	XXX				XXX					92	Mr Test 2	2019
7	105584	No number	Mr	Pickle	Dill	Pickle	xxx				Cape Tow					101	Mr Pickle	2019
8	106084	No number	Mr	Dingo	Dango	Dingo	xxx				xxx					101	Mr Dingo	2019

Financial records



h. Budget



Select a financial year: 2016 — Select the "Financial year".

h.1 Income

Account: - Income A — Select the most appropriate description from the drop-down menu that relates to the entry you are recording.

Budget Income Amount: — Enter the amount in "Budget Income Amount"

Comments: — Include any comments that relate to the entry you are recording.

Add budget income item — Select "Add budget income item" to record your entry.

h.2 Expenses

Account: - Expense . ▾ — Select the most appropriate description from the drop-down menu that relates to the entry you are recording.

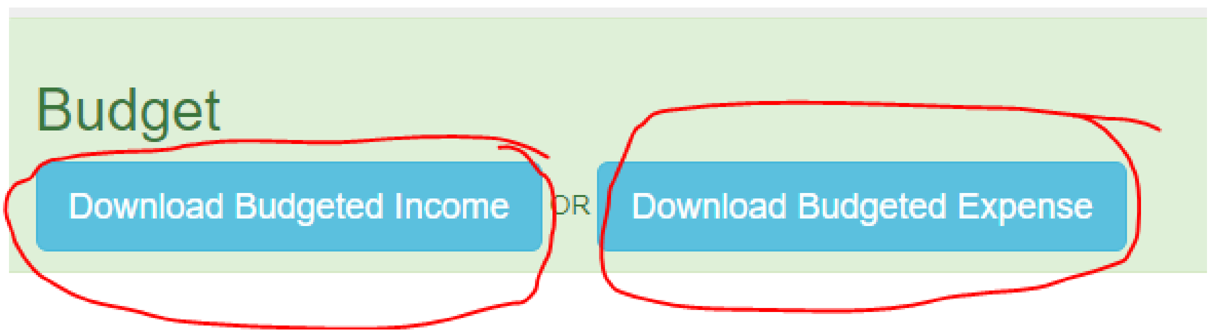
Budget Income Amount: — Enter the amount in “Budget Income Amount”

Comments: — Include any comments that relate to the entry you are recording.

Add budget income item — Select “Add budget income item” to record your entry.

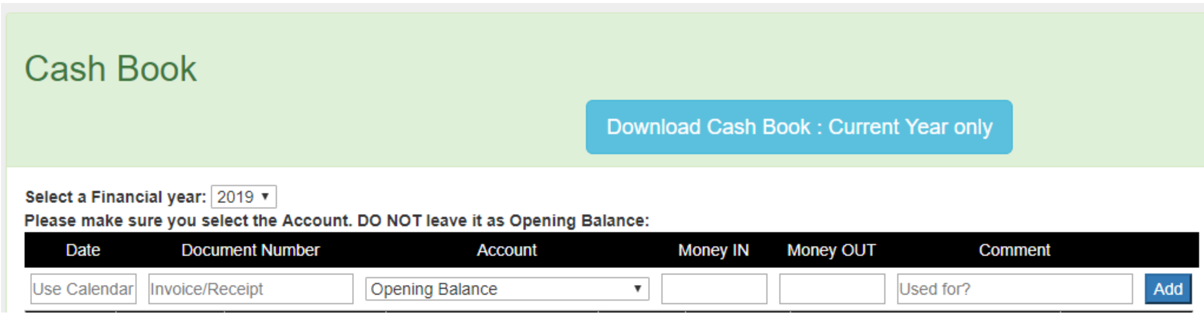
Download Budgeted information.

The information that will be downloaded for each option is what you see on the screen under each of the headings. Each download will be in a separate spreadsheet. Please note that this is sensitive and confidential information and is not for general distribution.



i. Cash book

The Cash Book is used to record all cash receipts



i.1. Selecting a financial year

Select the financial year you are recording. This selection will be made once and will only have to be updated when you start recording information for a new financial year. The options are available from a drop-down menu.

i.2 Opening balance

If, at the beginning of the financial year, not all the cash received has been deposited into the bank account, the balance of the cash should be recorded first.

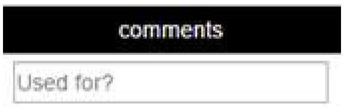
Date / Use Calendar — Select the date from the calendar

Doc.no. / Invoice/Receipt

Enter an invoice/receipt number. This reference should be unique as it will assist with the audit process.

Select "Opening balance" from the drop-down menu available.

The balance of the cash should be entered into the "Money IN" column.



Include any comments that relate to the entry you are recording that could be useful to others i.e. preparers of financial statements, and Auditors, in the "Comments" column.

Select "Add" to record your entry.

The opening balance entry recorded will be the first line and the balance will reflect in the "Running Total" column.

i.3 Entries

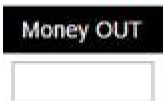
All other entries recorded during the year will be the same as indicated below.

Select the date from the calendar

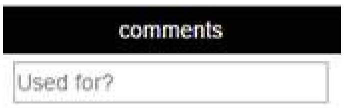
Enter an invoice/receipt number. This reference should be unique as it will assist with the audit process.

Select the most appropriate description from the drop-down menu that relates to the entry you are recording.

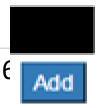
All cash received should be recorded in the "Money IN" column.



All cash paid out or deposited in the bank, should be recorded in the "Money OUT" column. It is not necessary to indicate the amount is a negative.



Include any comments that relate to the entry you are recording that could be useful to others i.e. preparers of financial statements, and Auditors, in the "Comments" column.



Select “Add” to record your entry.

After each entry, the net balance of the cash will reflect in “Running total”. This balance should be reconciled to the actual cash on hand. A variance between the cash on hand and the running total should be investigated immediately as it could indicate an error in recording entries or incomplete supporting documents.

i.4 Changing/deleting a recorded entry

Date	Document Number	Account	Money IN	Money OUT	Comment	
Use Calendar	Invoice/Receipt	Opening Balance			Used for?	Add

	Date	Document Number	Account	Money IN	Money OUT	Comment	Running Totals
Change	01 Jan 2019	12345	Tithes from pledges	500.00	0.00	Cash paid to Administrator	500.00
Change	24 Jan 2019	12345	Tithes from pledges	500.00	0.00	Cash paid to Administrator	1000.00
Change	25 Jan 2019	123456	Tithes from pledges	300.00	0.00	testing update	1300.00
Change	25 Jan 2019	123456	Tithes from pledges	500.00	0.00	testing update	1800.00
Change	01 Feb 2019	12345	Tithes from pledges	500.00	0.00	Cash paid to Administrator	2300.00
Change	25 Feb 2019	500	Tithes from pledges	500.00		Gave cash to Admin.	2800.00

Change — Select “Change” on the entry that was recorded and that must be changed.

Apply Change — After the change(s) has/have been made, select “Apply Change”.

Remove — To delete and entry select “Remove”.

Download Cash Book information.

Cash Book

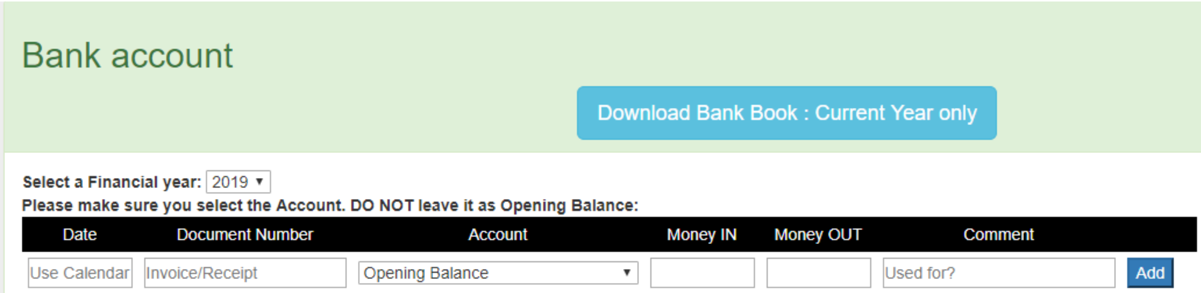
Download Cash Book : Current Year only

	Date	Document Number	Account	Money IN	Money OUT	Comment	Running Totals
Change	01 Jan 2019	12345	Tithes from pledges	500.00	0.00	Cash paid to Administrator	500.00
Change	24 Jan 2019	12345	Tithes from pledges	500.00	0.00	Cash paid to Administrator	1000.00
Change	25 Jan 2019	123456	Tithes from pledges	300.00	0.00	testing update	1300.00
Change	25 Jan 2019	123456	Tithes from pledges	500.00	0.00	testing update	1800.00
Change	01 Feb 2019	12345	Tithes from pledges	500.00	0.00	Cash paid to Administrator	2300.00
Change	25 Feb 2019	500	Tithes from pledges	500.00		Gave cash to Admin.	2800.00
Change	28 Feb 2019	123456	Tithes from pledges	150.00	0.00	testing update	2950.00
Change	01 Mar 2019	1234567	Tithes from pledges	500.00	0.00	Gave cash to Admin.	3450.00
Change	12 Apr 2019	123456	Tithes from pledges	50.00	0.00	testing name update	3500.00
Change	26 Apr 2019	123456	Tithes from pledges	250.00		received proof of payment by email	3750.00
Change	01 May 2019	123456	Tithes from pledges	500.00	0.00	testing update	4250.00

The information on the screen is downloaded to an Excel spreadsheet. This is to assist you to get the information into your Financial package easier, be it Sage or Pastel or any other package.

j. <u>Bank Account</u>

The Bank Account is used to record all transactions in the bank/current account.



j.1 Selecting a financial year

Select the financial year you are recording. This selection will be made once and will only have to be updated when you start recording information for a new financial year. The options are available from a drop-down menu.

j.2 Opening balance

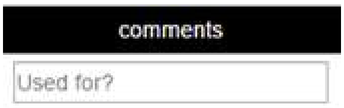
If starting a new financial year, the opening balance of the bank account should be recorded first.

Select the date from the calendar.

Enter an invoice/receipt number. This reference should be unique as it will assist with the audit process.

Select “Opening balance” from the drop-down menu available.

The bank account balance should be entered into the “Money IN” column, unless it is an overdraft in which case the balance should be entered in the “Money OUT” column.



Include any comments that relate to the entry you are recording that could be useful to others i.e. preparers of financial statements, and Auditors, in the “Comments” column.

Select “Add” to record your entry.

The opening balance entry recorded will be the first line and the balance will reflect in the “Running Total” column.

j.3 Entries

All other entries recorded during the year will be the same as indicated below.

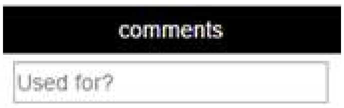
Select the date from the calendar.

Enter an invoice/receipt number. This reference should be unique as it will assist with the audit process.

Select the most appropriate description from the drop-down menu that relates to the entry you are recording.

All cash deposits, EFTs received, or cheques deposited should be recorded in the "Money IN" column.

All payments by cheque, EFT, debit or stop orders, or cash withdrawn should be recorded in the "Money OUT" column. It is not necessary to indicate the amount is a negative.



Include any comments that relate to the entry you are recording that could be useful to others i.e. preparers of financial statements, and Auditors, in the "Comments" column.

Select "Add" to record your entry.

After each entry, the net balance of the bank account will reflect in "Running total". This balance should be reconciled to the bank account balance. A variance between the bank account balance and the running total should be investigated immediately as it could indicate an error in recording entries or incomplete supporting documents.

J.4 Changing a recorded entry

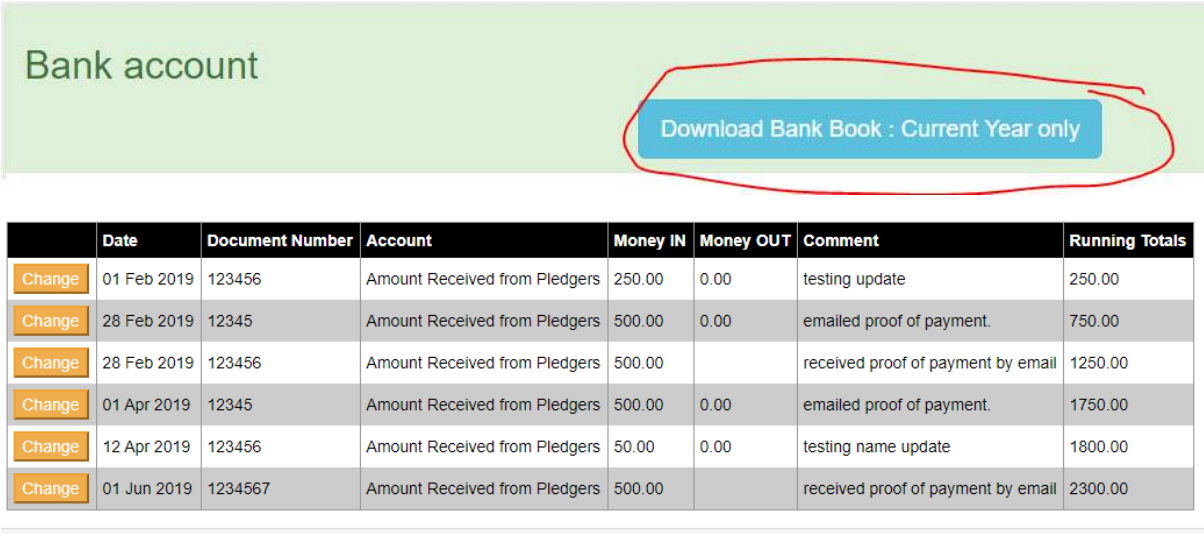
	Date	Doc.no.	Account	Cash IN	Cash OUT	Comments	Running Total
Change	01 Jan 2016		Opening Balance	100.00			100.00

Select "Change" on the entry that was recorded and that must be changed/deleted.

Once the change(s) have been made select the “Apply Change”.

To delete and entry select “Remove”.

Download Bank Book information.

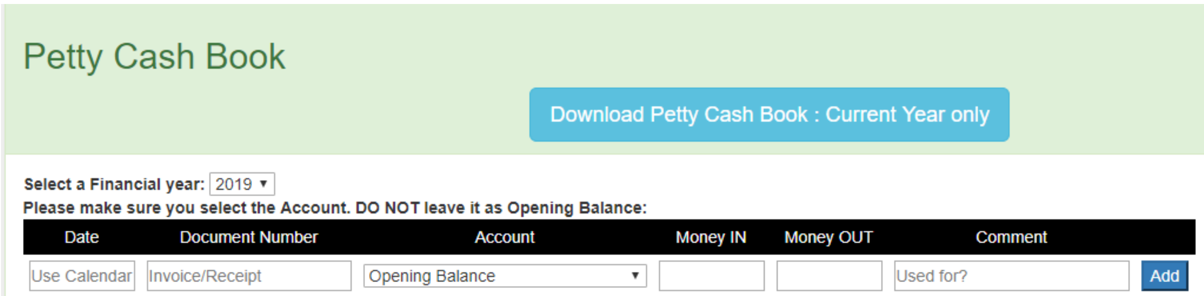


	Date	Document Number	Account	Money IN	Money OUT	Comment	Running Totals
Change	01 Feb 2019	123456	Amount Received from Pledgers	250.00	0.00	testing update	250.00
Change	28 Feb 2019	12345	Amount Received from Pledgers	500.00	0.00	emailed proof of payment.	750.00
Change	28 Feb 2019	123456	Amount Received from Pledgers	500.00		received proof of payment by email	1250.00
Change	01 Apr 2019	12345	Amount Received from Pledgers	500.00	0.00	emailed proof of payment.	1750.00
Change	12 Apr 2019	123456	Amount Received from Pledgers	50.00	0.00	testing name update	1800.00
Change	01 Jun 2019	1234567	Amount Received from Pledgers	500.00		received proof of payment by email	2300.00

The information on the screen is downloaded to an Excel spreadsheet. This is to assist you to get the information into your Financial package, be it Sage or Pastel or any other package.

Petty cash

The Petty Cash is used to record all petty cash transactions.



k.1 Selecting a financial year

Select the financial year you are recording. This selection will be made once and will only have to be updated when you start recording information for a new financial year. The options are available from a drop-down menu.

k.2 Opening balance

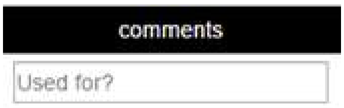
If starting a new financial year, the opening balance of the petty cash should be recorded first.

Select the date from the calendar.

Enter an invoice/receipt number. This reference should be unique as it will assist with the audit process.

Select "Opening balance" from the drop-down menu available.

The balance of the petty cash should be entered into the "Money IN" column.



Include any comments that relate to the entry you are recording that could be useful to others i.e. preparers of financial statements, and Auditors, in the "Comments" column.

Select "Add" to record your entry.

The opening balance entry recorded will be the first line and the balance will reflect in the "Running Total" column.

k.3 Entries

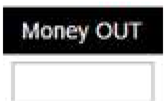
All other entries recorded during the year will be the same as indicated below.

Select the date from the calendar.

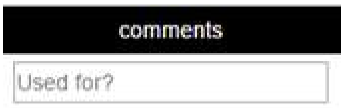
Enter an invoice/receipt number. This reference should be unique as it will assist with the audit process.

Select the most appropriate description from the drop-down menu that relates to the entry you are recording.

All cash received should be recorded in the "Money IN" column.



All cash paid should be recorded in the "Money OUT" column. It is not necessary to indicate the amount is a negative.



Include any comments that relate to the entry you are recording that could be useful to others i.e. preparers of financial statements, and Auditors, in the "Comments" column.

Select "Add" to record your entry.

After each entry, the net balance of the petty cash will reflect in "Running total". This balance should be reconciled to the petty cash balance. A variance between the petty cash balance and the running total should be investigated immediately as it could indicate an error in recording entries or incomplete supporting documents.

k.4 Changing a recorded entry

	Date	Doc.no.	Account	Cash IN	Cash OUT	Comments	Running Total
Change	01 Jan 2016		Opening Balance	100.00			100.00

Select "Change" on the entry that was recorded and that must be changed.

Once the change(s) have been made select the "Apply Change".

To delete and entry select "Remove".

Download Petty cash Book information.

	Date	Document Number	Account	Money IN	Money OUT	Comment	Running Totals
Change	10 Jun 2019	1593	Cash In: Deposit	125.00		found in garden	125.00

The information on the screen is downloaded to an Excel spreadsheet. This is to assist you to get the information into your Financial package easier. Be it Sage or pastel or any other package.

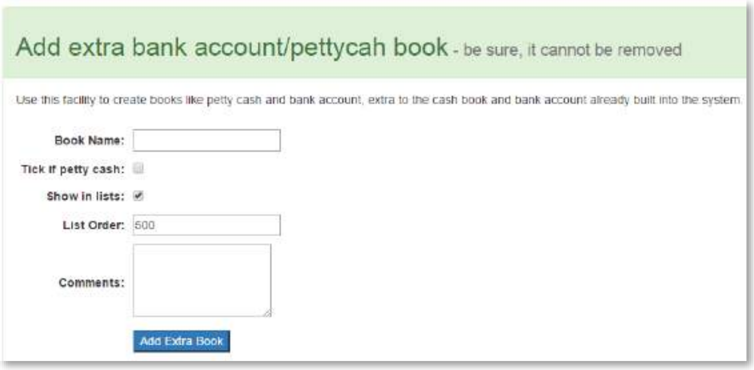
l. <u>Additional Cash Book, Bank Account or Petty Cash</u>

If more than one Cash Book, Bank Account or Petty Cash is required, the option is available. There is no option to download this "extra" information to the Excel spread sheets.

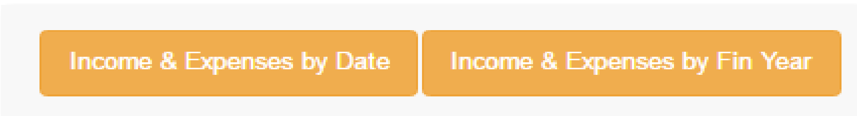
Select "Extra Bank Accounts" to create additional bank accounts.

Select “Extra Petty Cash books” to create additional bank accounts.

Select “Add extra book” to create any other additional cash related accounts that require separate recording. And complete the required fields. i.e. Book name and Comments



Reporting – Congregation or Parish income and expense



m. Income & Expenses by Date

This report can be generated to view the income and expenses for a specified date range.

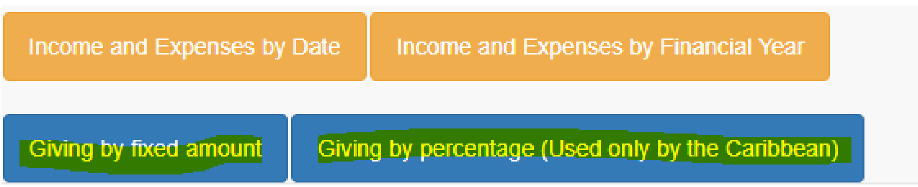
Enter the date range and select “Search Date”

n. Income and Expenses by Fin Year

This report can be generated to view the year to date income and expenses for a financial year and comparing it to the annual budget.

Select the financial year

Reporting – Denominational assessment/contribution



o. Giving by percentage

A report can be generated for assessments/contributions made based on a percentage of income. *(Used only by the Caribbean)*

For income and expenses relating to a specific period, select the start date of the report and the end date of the report by selecting the date from the calendar.

Select "Search Dates"

p. Giving by fixed amount

A report can be generated for assessments/contributions made compared to the commitment made. The regional or diocese office will complete the information and the parish will use it as an audit trail of payments made.

Select the applicable financial year.

Section 5: The Messaging System

What is the Messaging System?

The Messaging System is in development so the system can use WhatsApp and SMS.

Why we will use WhatsApp and SMS

There are many reasons for this:

1. **Increased membership engagement**: WhatsApp is a widely used platform for communication for increasing number of people, while SMS is still used by many because it does not require the purchasing of data. A messaging gives you a way to connect you're your membership quickly and easily, allowing them to take action and participate.
2. **Relevant messaging leads to increased engagement**: A messaging to the specific group means that you can send the right message at the right time to users who are interested. It is known that when a relevant messaging is sent it leads to an increased sense of belonging, engagement and action.
3. **It is simple both for sender and receiver**: Messages are easy to create, send and receive!
4. **Instant and effective communication**: There is no better way to get out quick, important information than a messages. Think about it: When a phone beeps with a message people are more likely to immediately open the message. They are delivered and opened quickly allowing members an immediate engagement.
5. **No junk folders**: Email is still a great means of your communication, but there is so much junk mail and junk sms' which clog our inboxes.

Section 6: The Denominational Portal:

This is for Denominational use in a subcontinent. This is where the General Assembly or Conference, or highest level of authority.

Features of the Portal

- See an overview of the Denomination's demographics
- Easily search for churches or members in your region
- Update and maintain list of Denominationally created groups
- Update and maintain list and records of all clergy and lay-leaders in the Denomination
- Update and maintain list and records of Denominational staff
- Email or message denominational leaders in bulk or as per position held
- E-mail or message all the church members in Bulk, or individuals

We use the one Denomination as an example.

What this portal offers

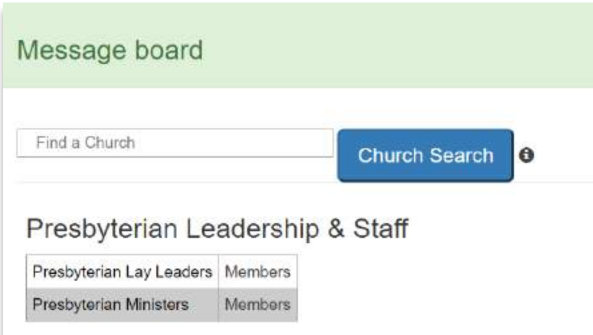
This Denominational Portal includes these areas:

- **Home**:
  - To manage the Clergy and Lay Leaders Roles, positions and terms of service
  - For Organisations: These are the Denominational Organisations, Schools and staff
- **Members**:
  - To add members, see all active and non-active members lists, members lists by Status and the Birthday list
  - For granting access: Grating Access to the various levels of the System;
  - To send Messages: Bulk emails and bulk messaging
- **Communication Groups**: Created groups for specific communication
- **Service Register**: An overview of the total worshipping attendance per Sunday through the Region, recorded per year.
- **Document Vault**: For safe keeping of important documents for private or public viewing
- **Overview**: Shows relevant graphs, statistics and numbers
- **Structure**: Where all levels in the Denomination's sub-groups, like Dioceses, Circuits, Parishes, and extensions are seen.
- **Church details**: Where the central office addresses and contact information is recorded
- **Church Events**: Where events can be created and managed from this level, as in General Assembly annual meetings or special functions.

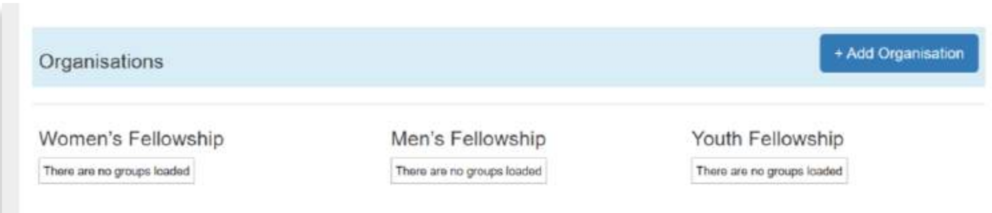
The opening page of the Portal shows what it offers:

Home:

Here the roles, positions and timeframes are recorded, and through which communications can be sent to each of these.



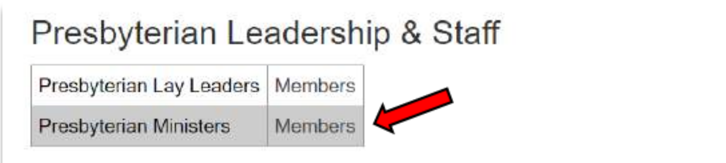
And then where the Denominational Organisations are managed:



Roles, positions and timeframes:

This is created so that you can see who is in what position/role and the terms of holding office (for how long), and then communicate with them according to those roles.

Clicking on 'Members':



And you will see this:

Under see all Members, you will see those who are in the various positions, their dates of

In this section you can:

- Find a member
- See all the roles, stations and timeframes for each person
- See and overview of the ages, genders, status and statistics
- Send Birthday messages: A list from which we can email and send birthday messages
- Send emails and messaging to all or various groupings
- See the list of the all the denominations clergy

appointment, and more:

Total: 144

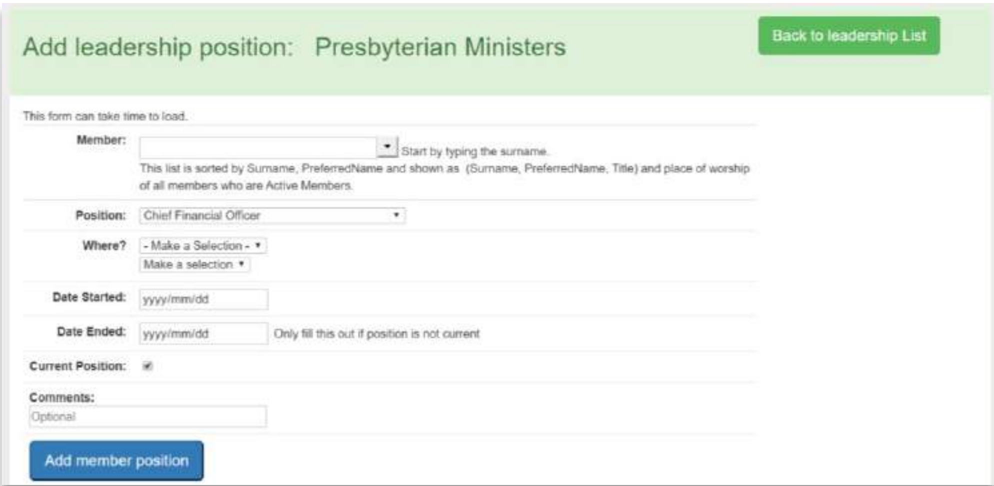
Hint You can click on tthe position to make changes and see all positions held by member.

Image	Member No.	Vault	Title	Name	Surname	Position	Start Date	Where	Additional info	Church Status
	149214	Docs	Rev	Data hidden		Moderator of the Presbytery	01 Jan 2018	Highveld,	check date	Minister
	149316	Docs	Rev			Moderator of the Presbytery	01 Jan 2019	Amatola, Eastern Cape		Minister
	149338	Docs	Rev			Moderator of the General Assembly Designate	01 Jan 2020	Uniting Presbyterian Church of Southern Africa,		Minister
	155175	Docs	Rev. Dr			Moderator of the General Assembly	01 Jan 2016	Uniting Presbyterian Church of Southern Africa,	check date	Minister
	149133	Docs	Rev. Dr			Ministry Secretary	01 Jan 2020	Uniting Presbyterian Church of Southern Africa,	check date	Minister
	149275	Docs	Rev			Minister-in Charge	01 Jan 2010	St Andrew's Presbyterian Church, King William's Town		Minister

Creating the list of Ministers, Clergy, Deacons, and other role players:

Click on 'See all members' to see all clergy:

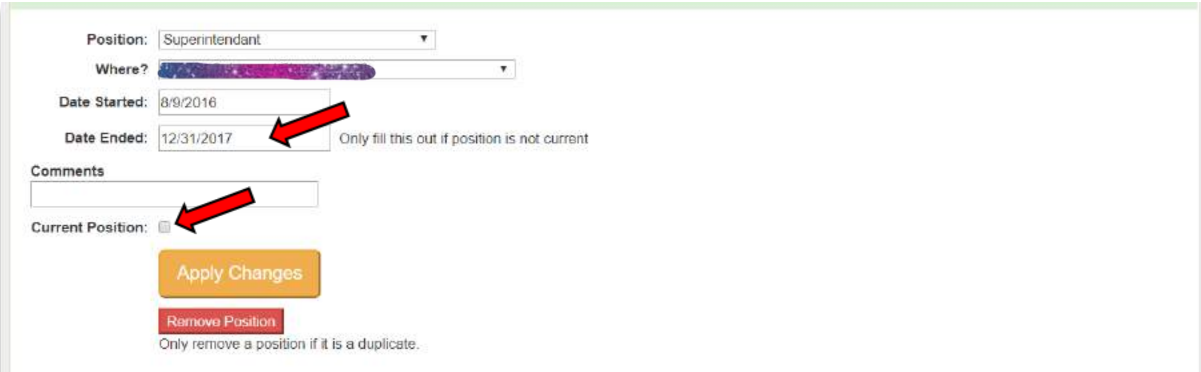
To add new roles, click on + Add Leadership position, then complete the following:



Once done a list will appear.

To make changes or show the end of the timeframe for the appointment, click on the role. If incorrect, click on 'Make Changes' and delete the entry.

If the term of the appointment or timeframe has ended, enter 'Make Changes' and enter the 'Date Ended' and untick the 'Current Position' box. Then 'Apply Changes'.

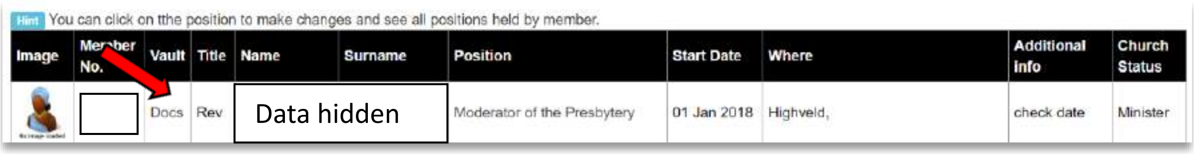


Lay Leadership Appointments:

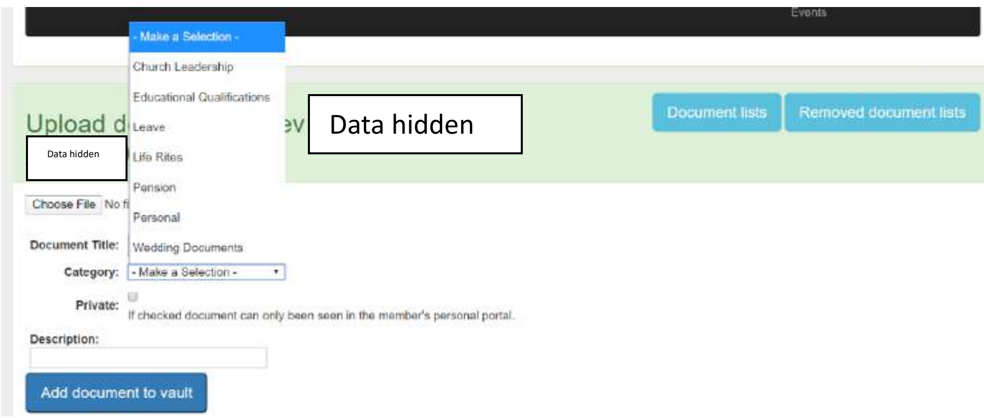
This is entered and applied in the same way.

Vault: Individualised

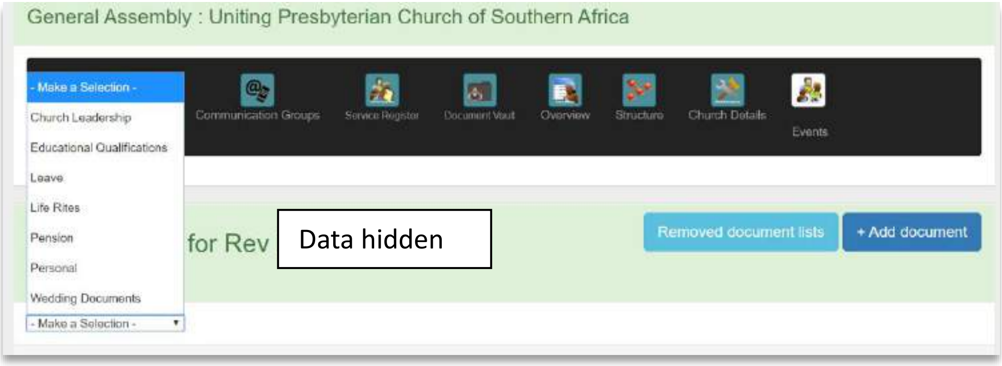
You can add important documents to specific Clergy Person's Vault:



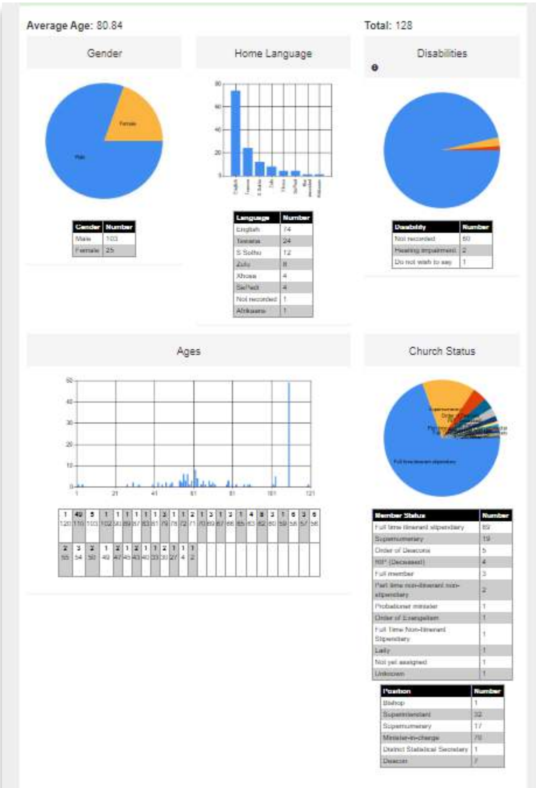
e.g. an Ordination Certificate or Qualifications:



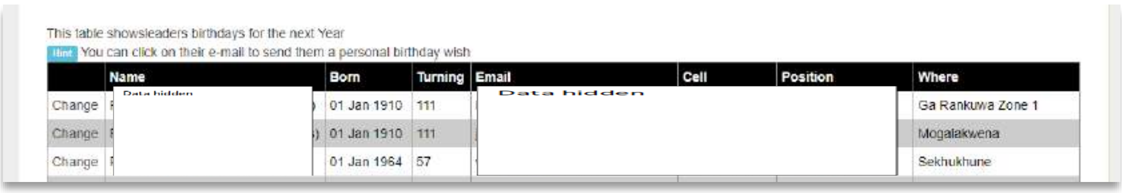
You can them see what has been saved and add or delete as required:



The Clergy/Minister's 'Overview' shows statistics related to that portal: Average age, Genders, languages, Disabilities, Ages, Status' and roles:

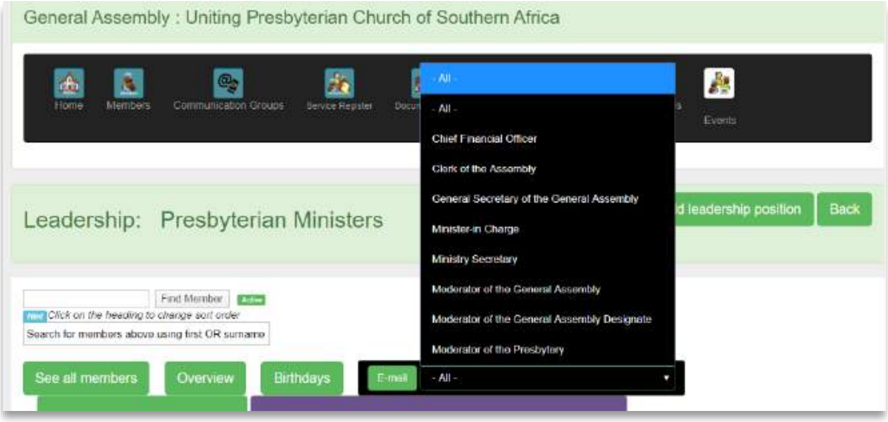


Messaging people: For example, to message a person on their birthday, click on the email and it generates an email which you can then personalise and send to that person:



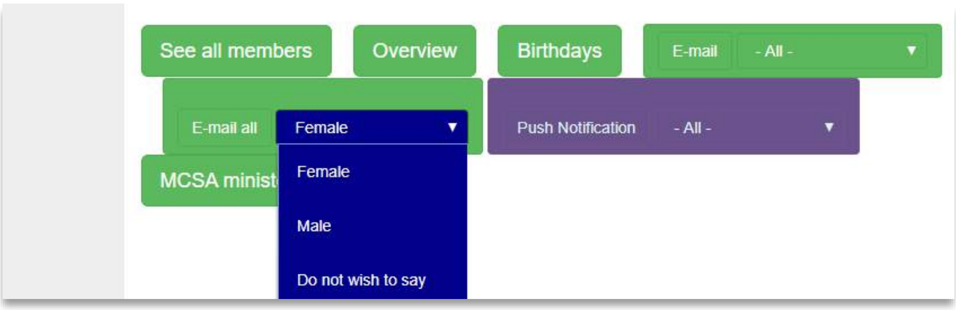
Communications via email:

The dynamic of this system is that it is integrated so that, once a role is established, it links to the various relevant groups where this role or Status is required.

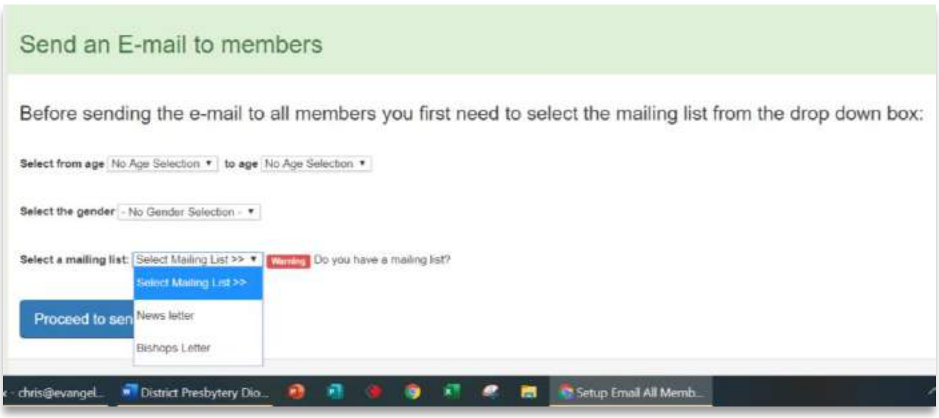


This applies to ALL communications. The System automatically sorts the roles into emailing groups for ease of communication: e.g. 'All' or other selected ones like 'Priests'

When sending a general email to all the members in the Synod, there is also a ***sort*** function based on Gender. So, if you wish to send an email to all and only the ladies in the Synod, here is where you do that:



The normal ways of sending emails exists as in other portals, including setting up the mailing lists and even create a signature as a Jpeg to insert at the end of each email.



Once the Mailing lists is selected, click on 'Proceed to email' where the body of the email is typed or copied, spell-checked and edited before sending.

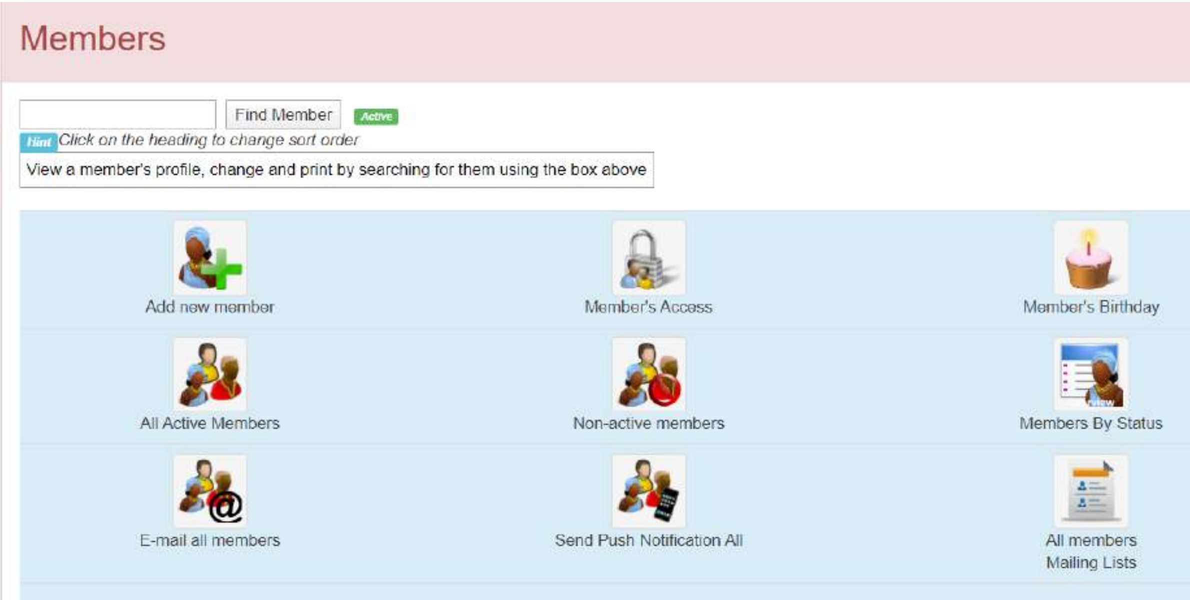
<u>**NOTE**</u>: The Bulk Messaging System is currently being improved to include WhatsApp and SMS.

Members:

Much here is self-explanatory, so only two areas are highlight here, while others are explained above.

In the Members' section:

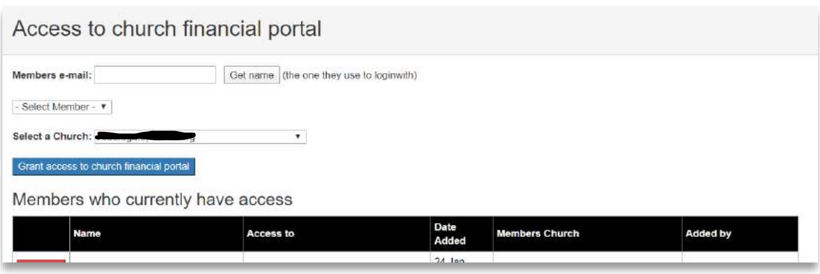
- Add a member
- Member's Access: Where access to the various levels of the System as grated and removed
- A birthday list for the whole region
- See all he active and non-active members in lists
- See members in lists by their Status (e.g. Theological Students)
- Communications: via email and messaging, and email reports



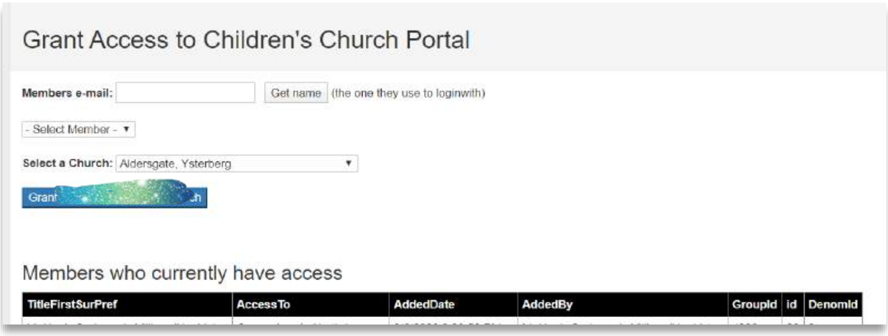
Member's Access:

Specific Access is needed for

- **Finance Portal**: with extra steps for security, of inserting an email address in the required block, finding them and then grating them Access. This is if they are registered in the system. I list appears as to who has access for the various congregations.



- **Children's Portal**: **ACCESS TO THIS PORTAL IS ONLY GRANTED HERE**: This has more explanation in the Section on the Children's Portal, but for is done for the security of child-care, and to be compliant with the Children Protection laws. Access to this portal is restricted, and permission is given at this level. This involved inserting an email address, finding the person in the pulldown, selecting the member and then granting them Access. A list appears of who has access to this portal.

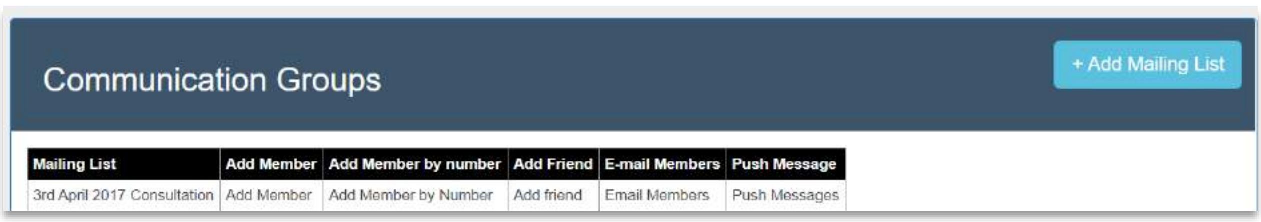


Members by Status:

Here you can see a report in a list of all who are in a specific 'Status' in the whole region, by selecting from the pull-down:

Communication Groups:

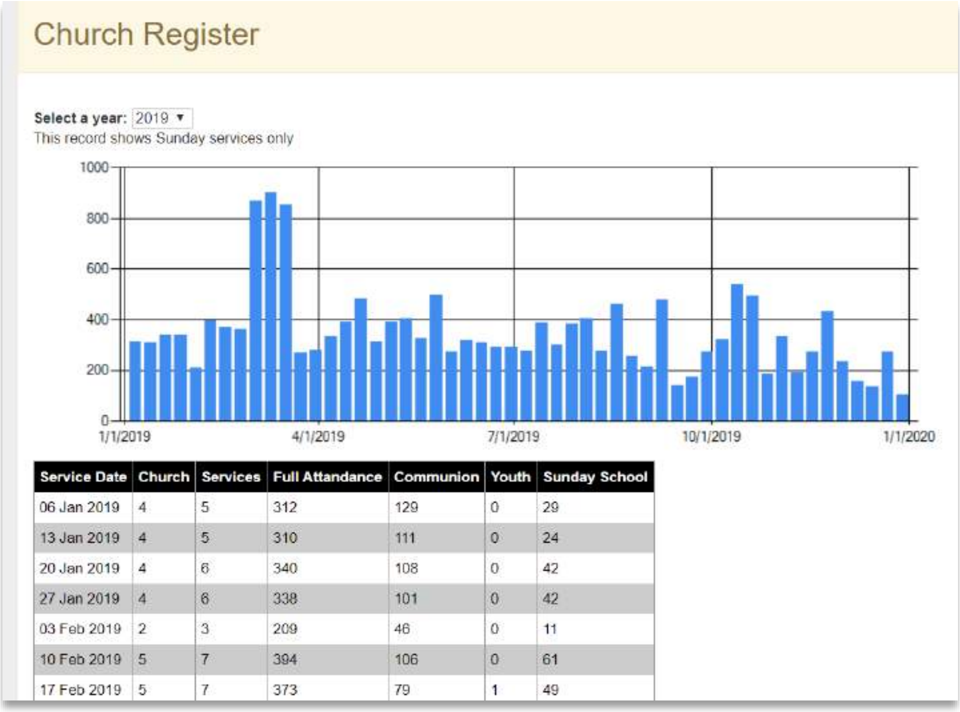
This applies where groups are needed that are not in the set groups by Role and Title. Add a mailing list and populate it with the required members:



Sending messages, adding and removing members (and even adding people who are not members in the System which we call 'Friends'), enables management of communication very easy and for a number of role players.

Worship Attendance Register

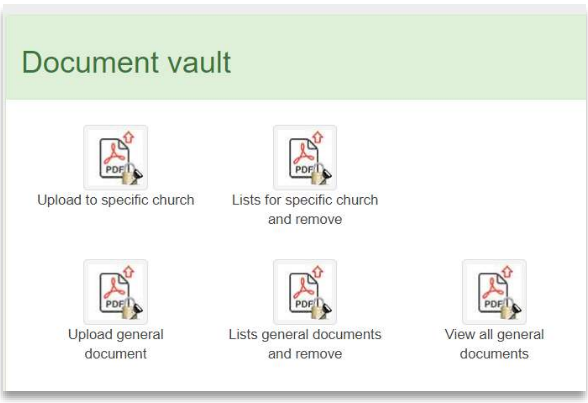
This gives an overview of the numbers of worshippers, children, youth and folk whom have taken communion each week, etc. This can hold historical records over many years. E.g.



Service Date	Church	Services	Full Attandance	Communion	Youth	Sunday School
06 Jan 2019	4	5	312	129	0	29
13 Jan 2019	4	5	310	111	0	24
20 Jan 2019	4	6	340	108	0	42
27 Jan 2019	4	6	338	101	0	42
03 Feb 2019	2	3	209	46	0	11
10 Feb 2019	5	7	394	106	0	61
17 Feb 2019	5	7	373	79	1	49

Document Vault:

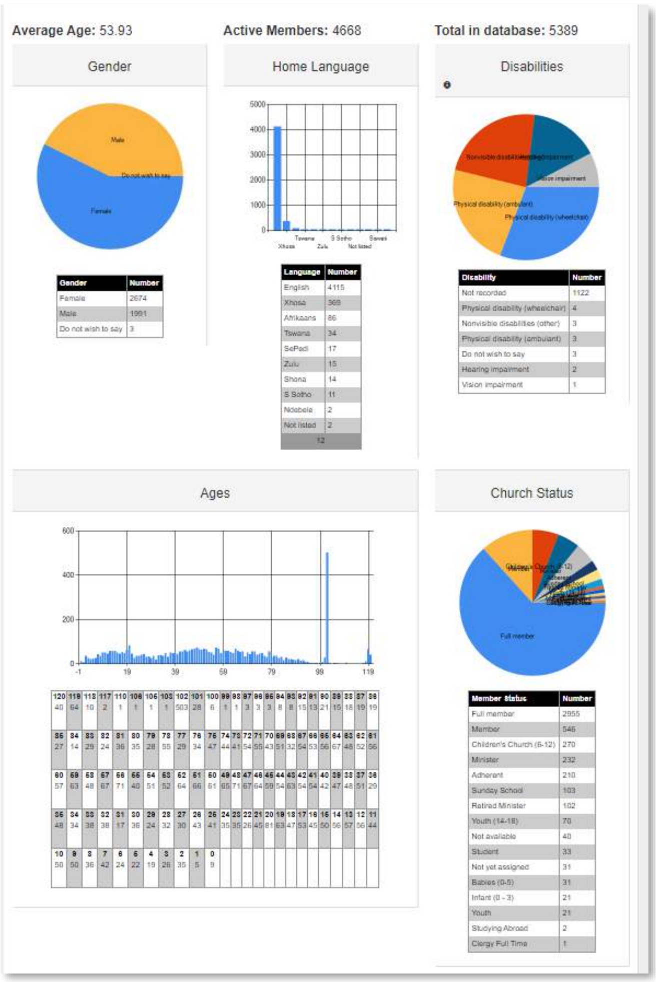
Here important documents can be stored. Example: Title Deeds, photographs of facilities and building for insurance purposes. They are stored for the Denominational level or for a specific congregation.



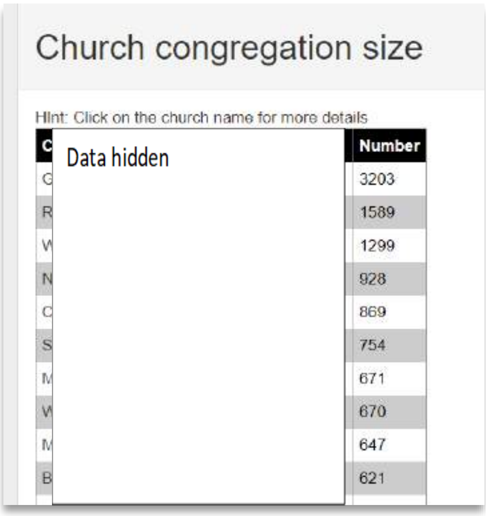
Overview:

This is a powerful tool to see an umbrella view of the statistics of the denomination.

Here is an example of the graphs:



And the specific number of each congregation can be seen:

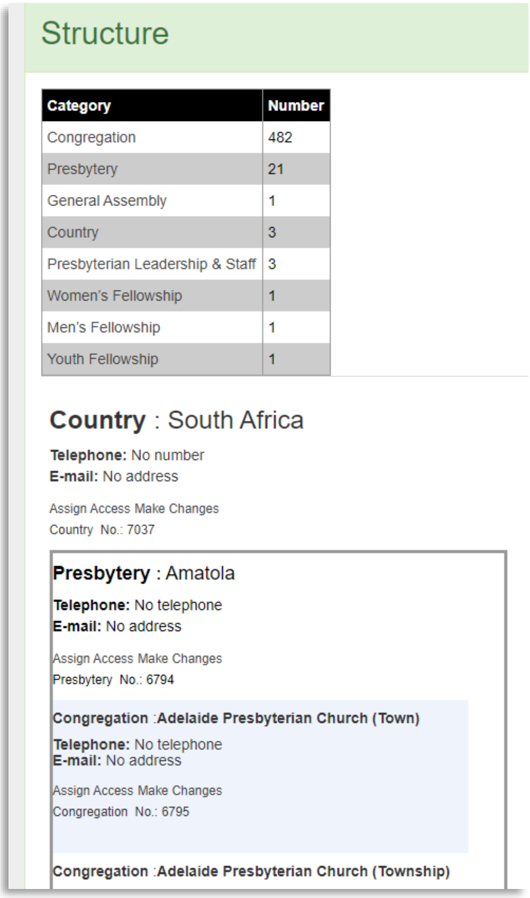


Are numbers important?

Note:

- There is a book in the Bible called numbers
- In Jesus' parable on the lost sheep, how did the shepherd know that one was lost?
- Not is interested in both quality and quantity: "Come follow me and I will make you fishers of people." Both/And.
- One person is as important as another, because God loves ALL people. The one who is unchurched and de-churched matters to God as much as the one in the church.

Structure:

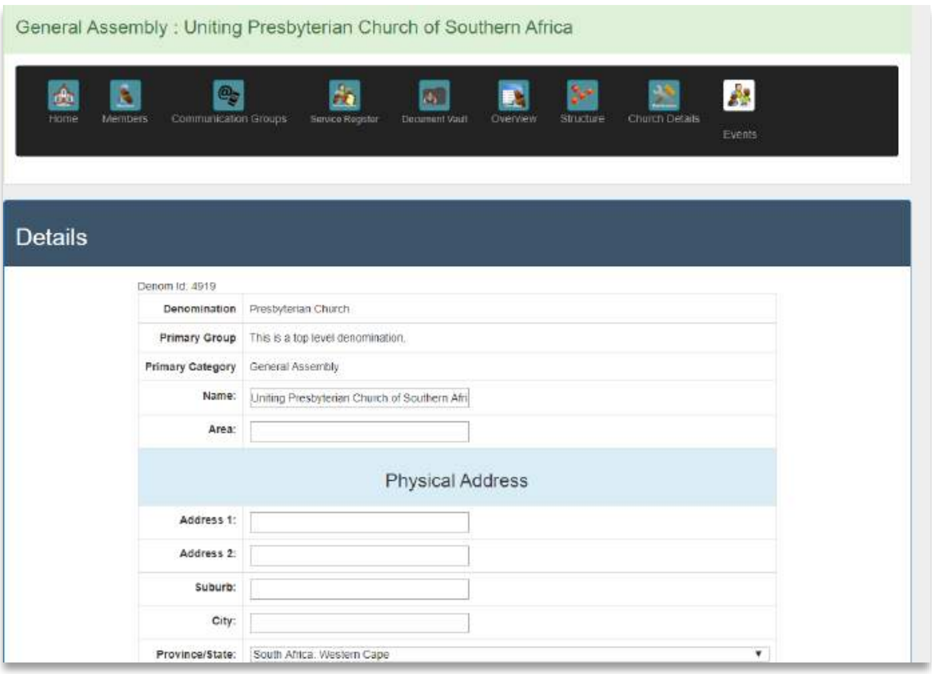


Here the whole Region's Structure can be seen. Here is where any Amendments are made, and another place in the System from where Access can be given to congregation's portals.

NOTE: If an additional congregation is needed, this can be easily done and is a service we offer, so kindly contact support@mychurchit.org with all the relevant information and this will be done for you.

Church Details:

Here the contact details are saved, which link into the Denominational websites, where applicable, and where historical information, statement of purpose, vision the like, can be recorded.

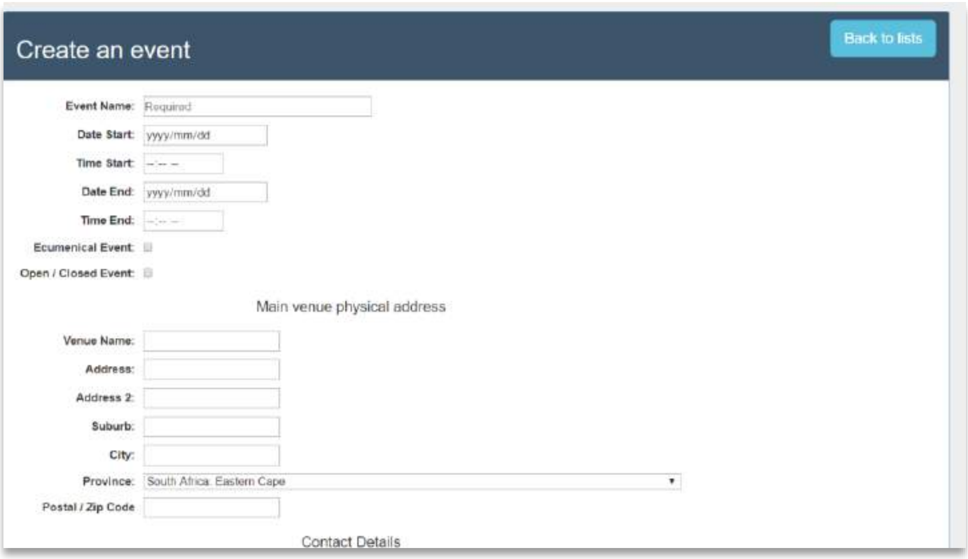


Events:

There is another Section (Ten) which outlines this aspect in more detail.

Significant events like Youth Camps and Conventions can be organised from this Portal. If online payments are involved, then another step is required at a Denominational level and will need to be activated for codes for online payments. There is a list of all events in the Region:

Creating an Event: The basics on how to create and event are: Click on 'Create and event' complete the fill in spaces and save.



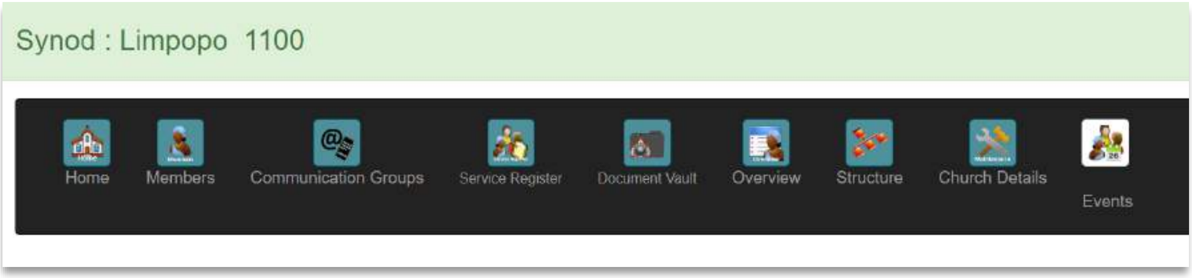
You then can advertise via email and social media, inviting people to log into their Personal Portals, click on 'Events' and sign up for your scheduled event.

Section 7: The Regional Portal: Synod / Diocese /District / Presbytery

This is for Denominational use in a region like a Synod, District, Presbytery or Diocese. This is the place for the regional structure to use the System for their work.

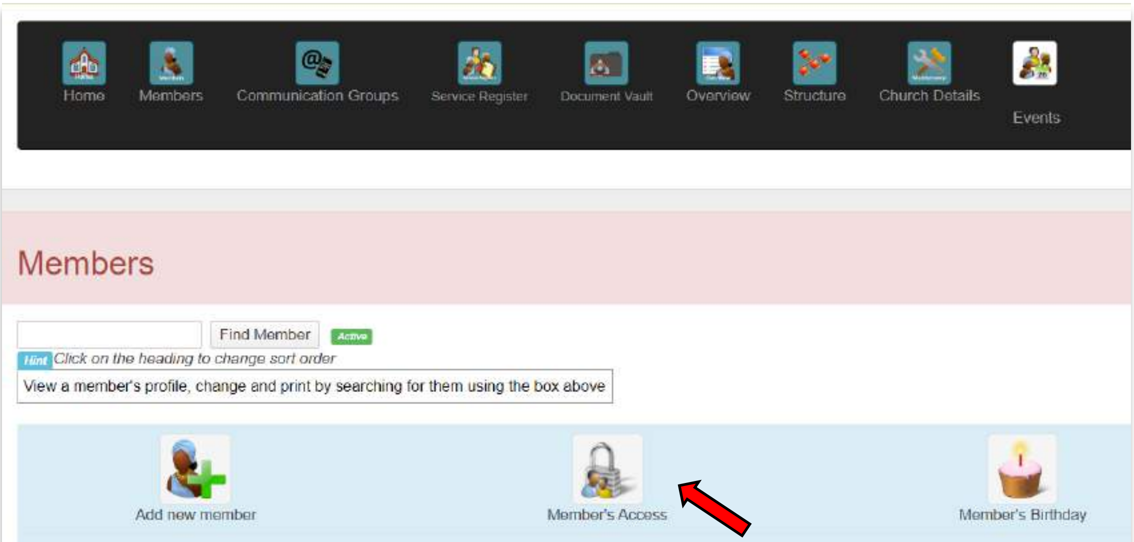
Features of the Portal
• See an overview of the regions' demographics • Easily search for churches or members in your region • Update and maintain list of regionally created groups • Update and maintain list and records of clergy and lay-leaders in the region • Update and maintain list and records of regional staff • Email or message regional leaders • E-mail or message all the church members in Bulk, or individuals

As an example, we use a Methodist District/Synod:



Access to this Portal

Access is granted in few ways: through the denominational structure; or an authorised person who already has access; or by arrangement with the MyChurchIT team by emailed request, as permission is needed.

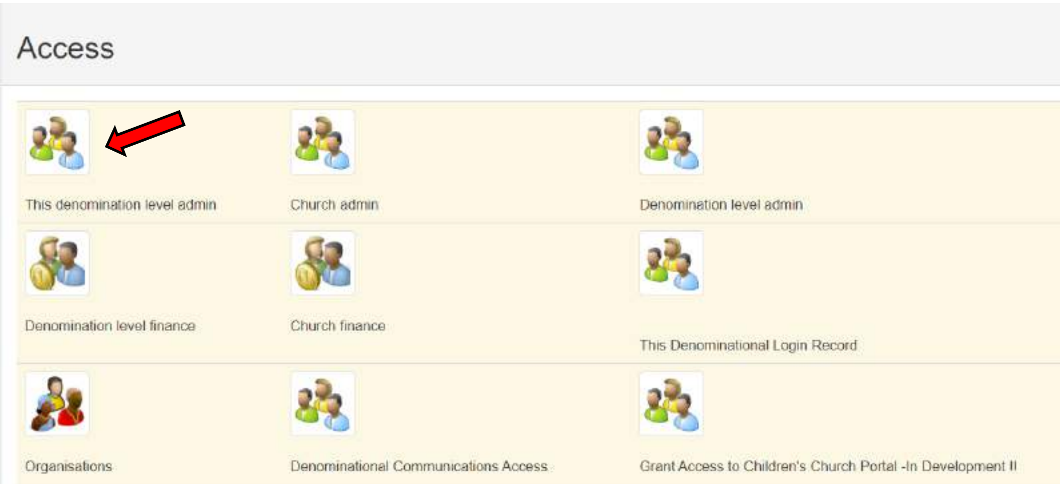


Those who already have access and authority, click on 'Members' and then on 'Member's Access':

There are several levels of Access granted to specific portals:

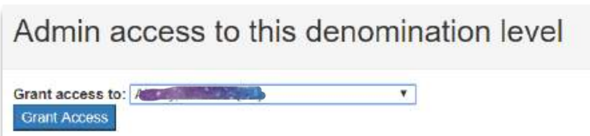
- **This Denomination level admin**: For granting Access to manage the Portal's members, communications, see worship attendance, store documents into the Vault, and managing events;
- **Church Admin**: This level access for the Synod/Dioceses/Presbytery;
- **Denominational level admin**: This shows the full list of who have been granted access to which portals at all levels
- **Denominational level finance**: The financial Portal for this level
- **Church Finance**: This shows the full list of those who have been given authority to use the financial portal at all levels from this one through to local church, including another way to give access.
- **This Denominational Login record**: This reflects a full record who logged and when for record and security purposes;
- **Organisations**: These are the Organisations specific to this Synod/District, not the Denominational ones, which appear on the 'Home' page.
- **Denominational Communication Access**: Where specific people can be given the access to be able to communicate with all the members in a sub-sections/Circuits/Parish (see below under 'Communications')

We will come back to the above options later, but for now, click on 'This denominational level access':



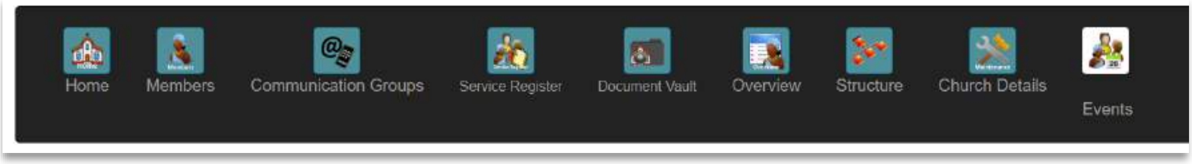
Then search for the person,

and then click on 'Grant Access'



The Regional Level: What is on offer?

The opening page of the Portal shows what it offers:



This Regional Portal includes these areas:

- **Home**:
    - To manage the Clergy and Lay Leaders Roles, positions and terms of service
    - For Organisations: These are the Denominational Organisations, Schools and staff
    - For District/Synod/Diocese/Presbytery Organisations: These are the Organisations which are particular to this grouping
- **Members**:
    - To add members, see all active and non-active members lists, members lists by Status and the Birthday list
    - For granting access: Grating Access to the various levels of the System;
    - To send Messages: Bulk emails and bulk messaging
- **Communication Groups**: Created groups for specific communication
- **Service Register**: An overview of the total worshipping attendance per Sunday through the Region, recorded per year.
- **Document Vault**: For safe keeping of important documents for private or public viewing
- **Overview**: Shows relevant graphs, statistics and numbers
- **Structure**: Where all levels in the District' sub-groups, like Circuits, Parishes, and extensions are seen.
- **Church details**: Where the central office addresses and contact information is recorded
- **Church Events**: Where events can be created and managed from this level, as in Synod annual meetings or special functions.

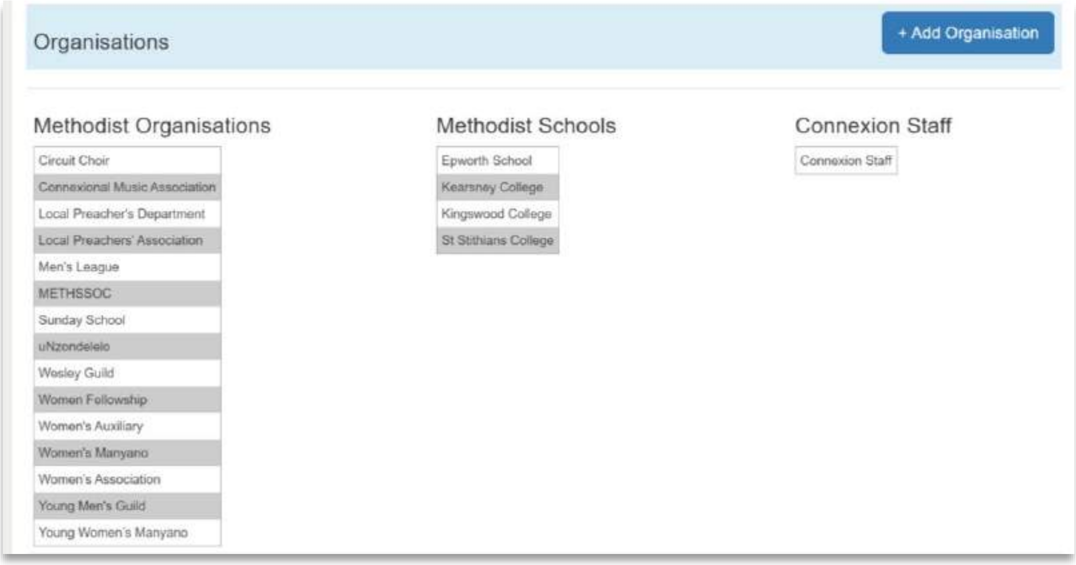
Home:

Here the roles, positions and timeframes are recorded, and through which communications can be sent to each of these.


Methodist Leadership & Staff

Methodist Ministers	Members
Methodist Lay Leadership	Members
Methodist Evangelists	Members
Methodist Biblewoman	Members
Methodist Youth Leadership	Members

And then where the Denominational Organisations are managed:

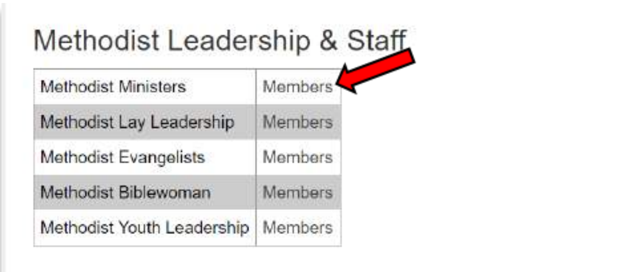


And manage the District Office as well as specifically mandated District Organisations:

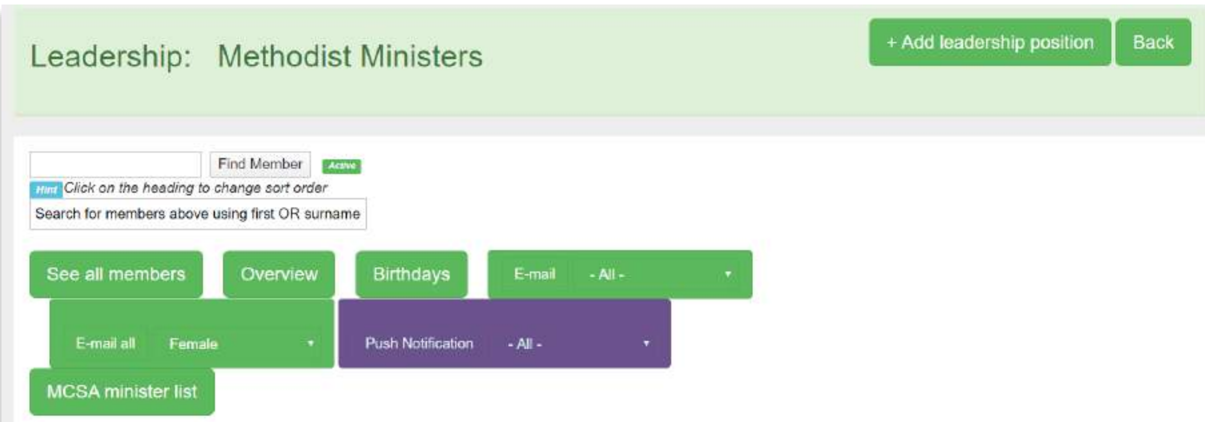
Roles, positions and timeframes:

This is created so that you can see who is in what position/role and the terms of holding office (for how long), and then communicate with them according to those roles.

Clicking on 'Members':



To see this:



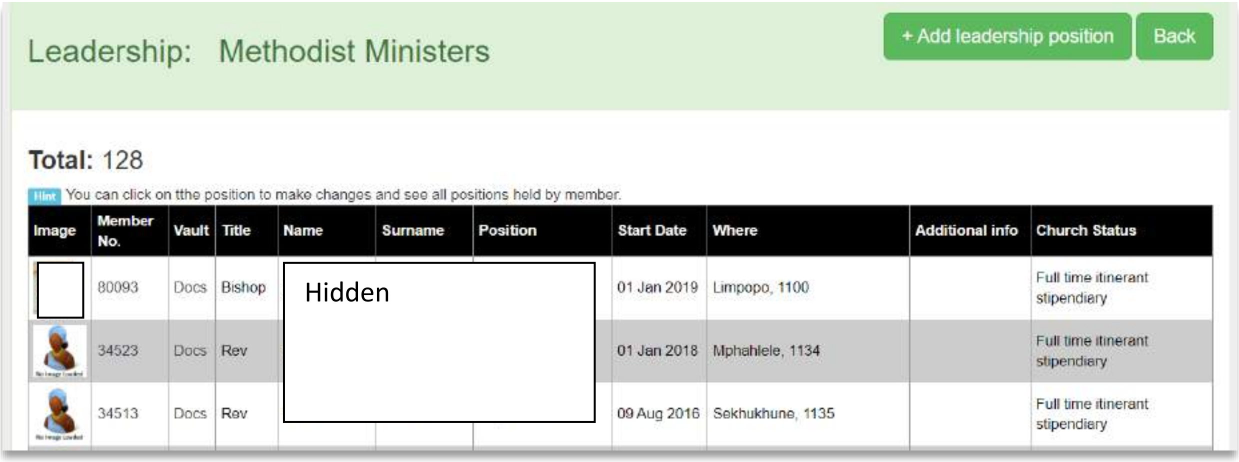
In this section you can:

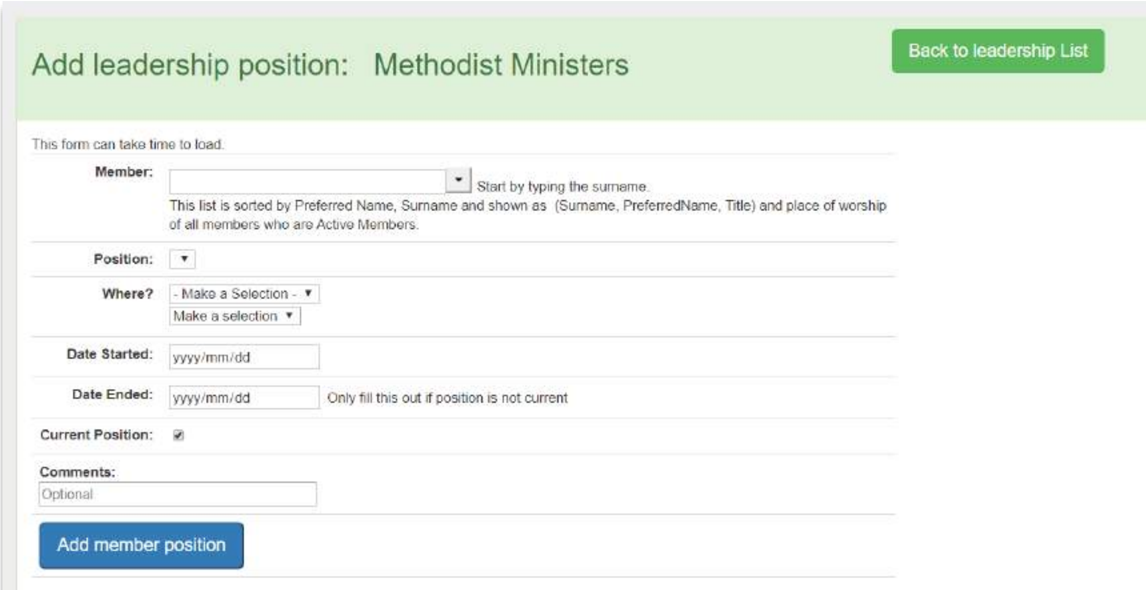
- Find a member
- See all the roles, stations and timeframes for each person
- See and overview of the ages, genders, status and statistics
- Send Birthday messages: A list from which we can email and send birthday messages
- Send emails and messaging to all or various groupings
- See the list of the all the denominations clergy

Creating the list of Ministers, Clergy, Deacons, and other role players:

Click on 'See all members' to see all clergy:

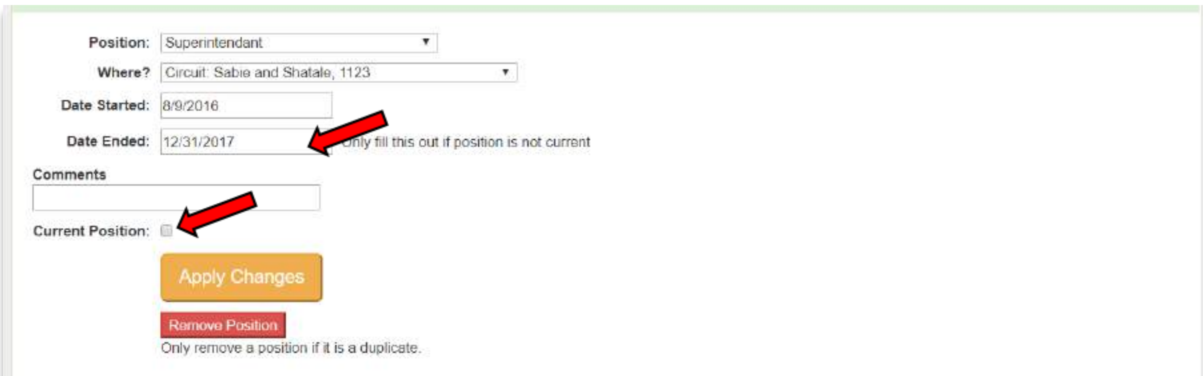
To add new roles, click on + Add Leadership position, then complete the following:





Once done, a list will appear. To make changes or show the end of the timeframe for the appointment, click on the role. If incorrect, click on 'Make Changes' and/or delete the entry.

If the term of the appointment or timeframe has ended, enter 'Make Changes' and enter the 'Date Ended' and untick the 'Current Position' box. Then 'Apply Changes'.

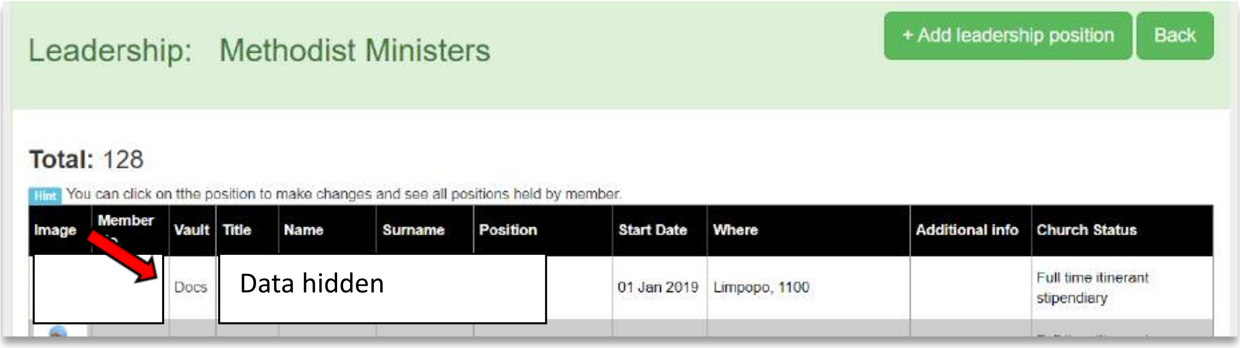


Lay Leadership Appointments:

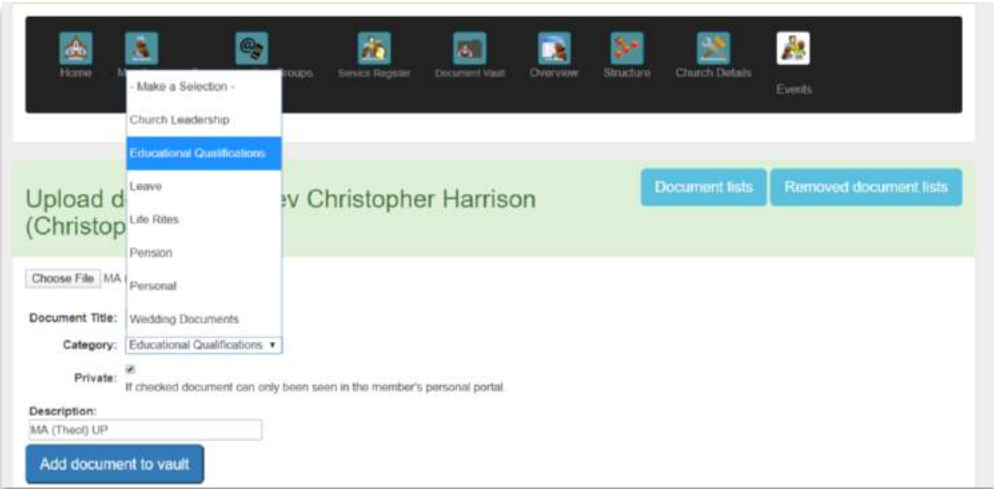
This is entered and applied in the same way.

Vault: Individualised

You can add important documents to specific Clergy Person's Vault:



e.g. an Ordination Certificate or Qualifications:



The Clergy/Minister's 'Overview' shows statistics related to that portal: Average age, Genders, languages, Disabilities, Ages, Status' and roles:

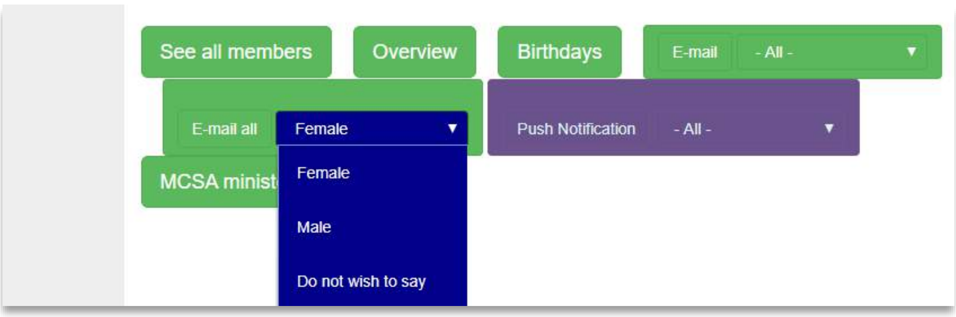
Messaging people: For example, to message a person on their birthday, click on the email and it generates an email which you can then personalise and send to that person:

Communications via email:

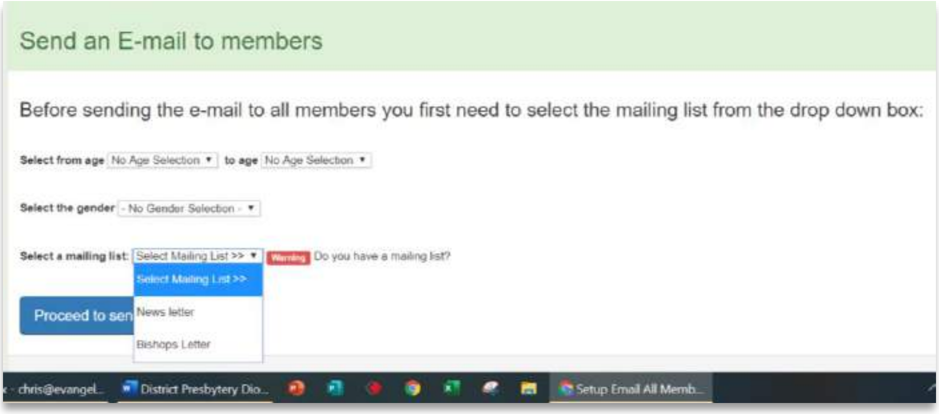
The dynamic of this system is that it is integrated so that, once a role is established, it links to the various relevant groups where this role or Status is required.

This applies to ALL communications. The System automatically sorts the roles into emailing groups for ease of communication: e.g. All or Superintendents/Parish Priests

When sending a general email to all the members in the Synod, there is also a ***sort*** function based on Gender. So, if you wish to send an email to all and only the ladies in the Synod, here is where you do that:



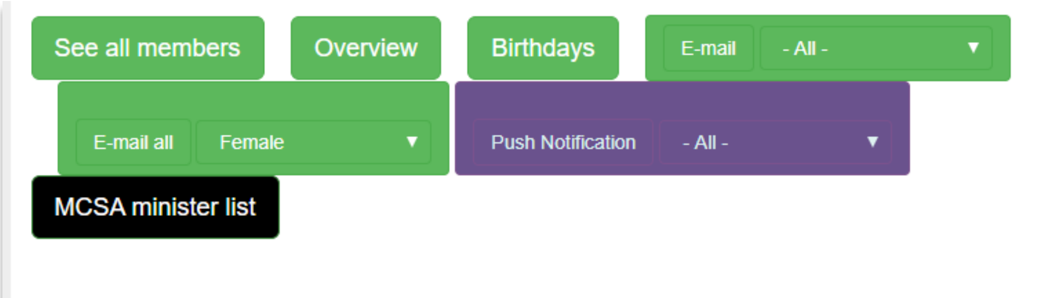
The normal ways of sending emails exists, as in other portals, including setting up the mailing lists and even create a signature as a Jpeg to insert at the end of each email.



Once the Mailing lists is selected, click on 'Proceed to email' where the body of the email is typed or copied, spell-checked and edited before sending.

> **NOTE**: The Bulk Messaging System is currently being improved to include WhatsApp and SMS.

The full list of ministers in the Connexion/Province and Assembly are found here: e.g. under 'MCSA Ministers':

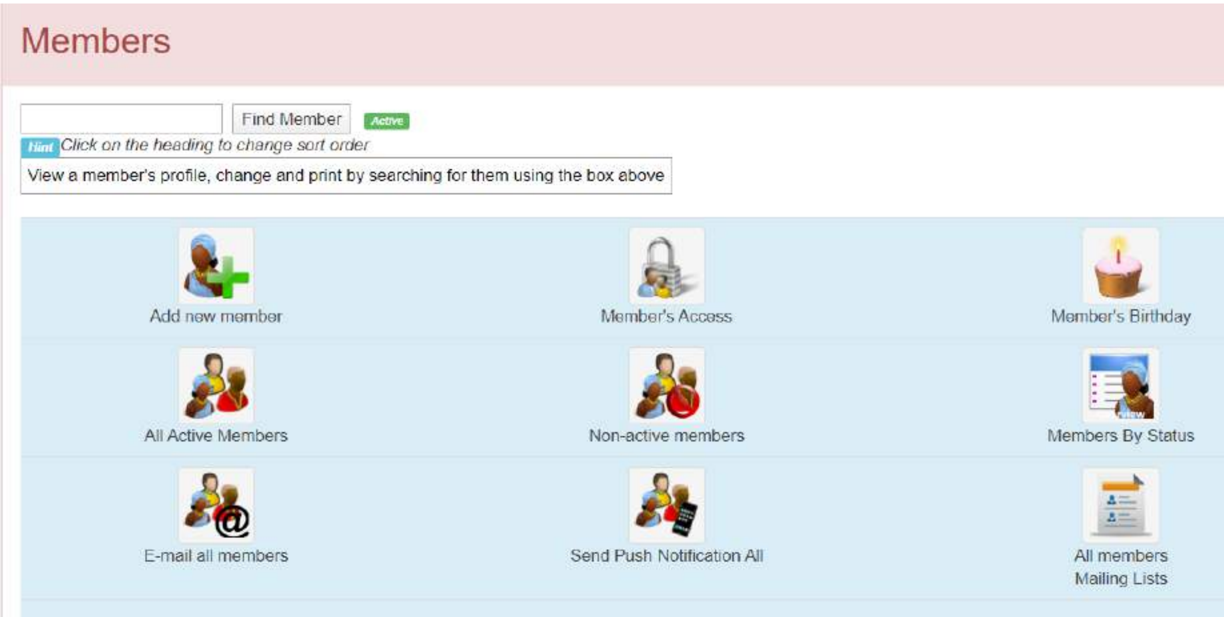


Members:

In the Members' section:

- Add a member
- Member's Access: Where access to the various levels of the System as grated and removed
- A birthday list for the whole region
- See all he active and non-active members in lists
- See members in lists by their Status (e.g. Theological Students)
- Communications: via email and messaging, and email reports

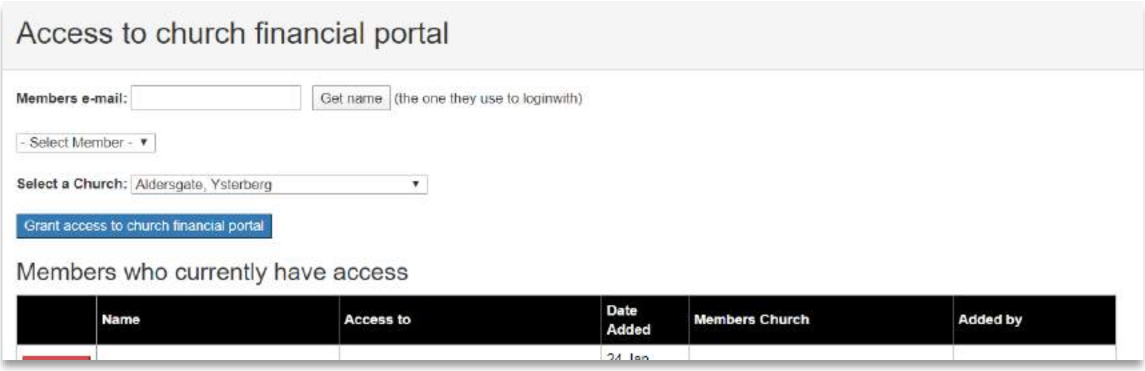
Much here is self-explanatory, so only two areas are highlight here, while others are explained above.



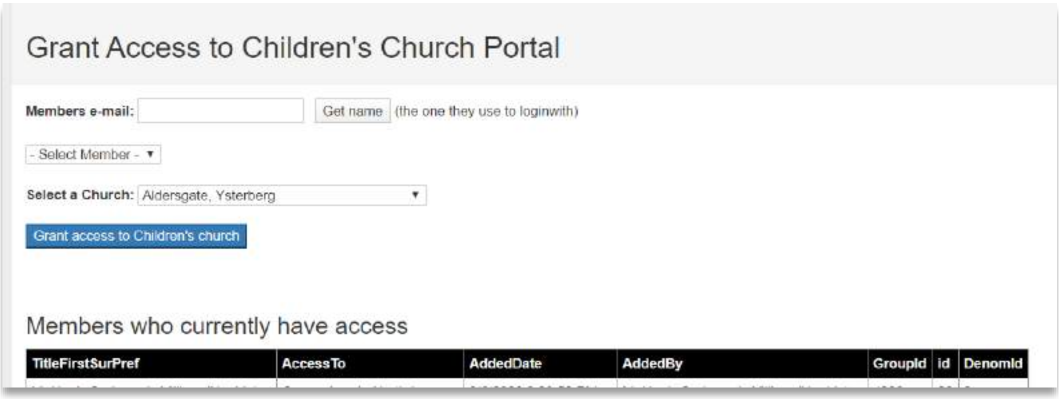
Access:

Specific Access is needed for

- **Finance Portal**: with extra steps for security, of inserting an email address in the required block, finding them and then grating them Access. This is if they are registered in the system. I list appears as to who has access for the various congregations.

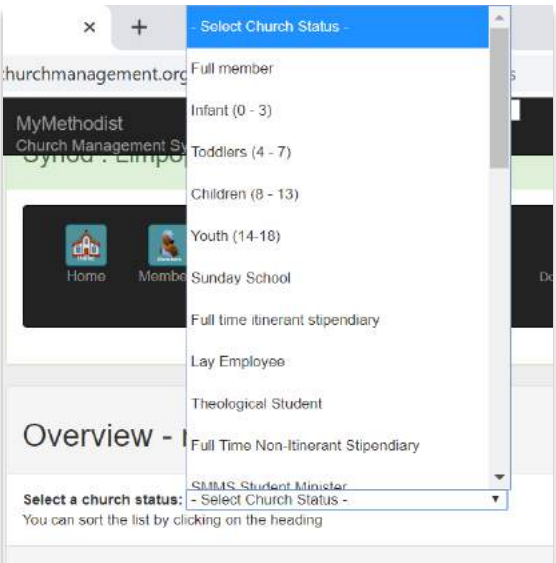


- **Children's Portal**: **ACCESS TO THIS PORTAL IS ONLY GRANTED HERE**: This has more explanation in the Section on the Children's Portal, but for is done for the security of child-care, and to be compliant with the Children Protection laws. Access to this portal is restricted, and permission is given at this level. This involved inserting an email address, finding the person in the pulldown, selecting the member and then granting them Access. A list appears of who has access to this portal.



Members by Status:

Here you can see a report in a list of all who are in a specific 'Status' in the whole region, by selecting from the pull-down:



Communication Groups:

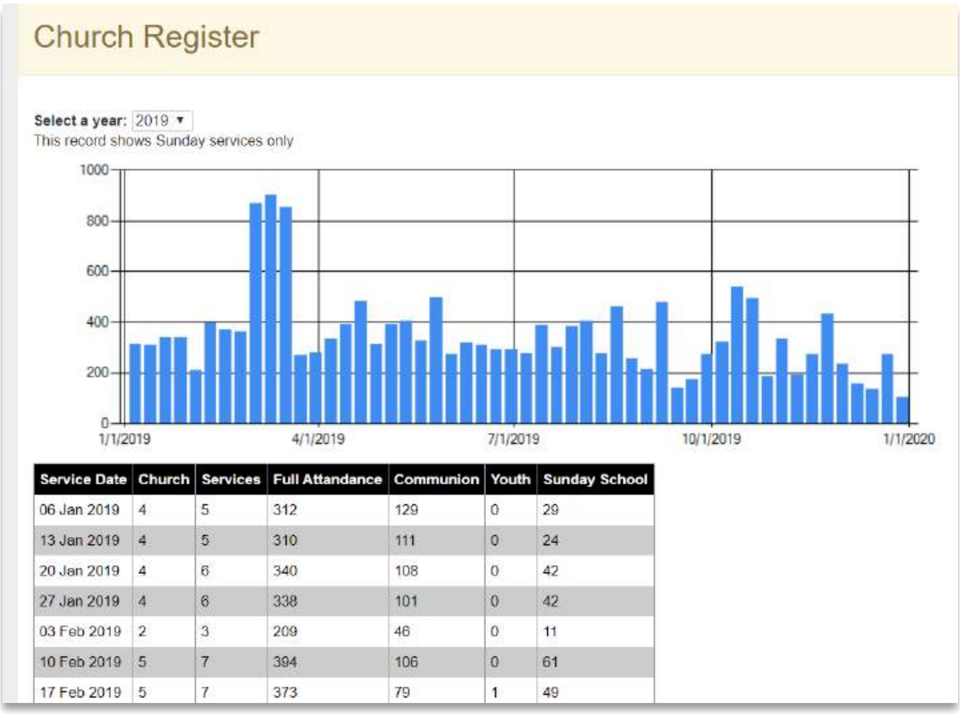
This applies where groups are needed that are not in the set groups by Role and Title. Add a mailing list and populate it with the required members:

Mailing List	Add Member	Add Member by number	Add Friend	E-mail Members	Push Message
3rd April 2017 Consultation	Add Member	Add Member by Number	Add friend	Email Members	Push Messages

Sending messages, adding and removing members (and even adding people who are not members of your church into the System which we call 'Friends'), enables management of communication very easier and for a number of role players.

Worship Attendance Register

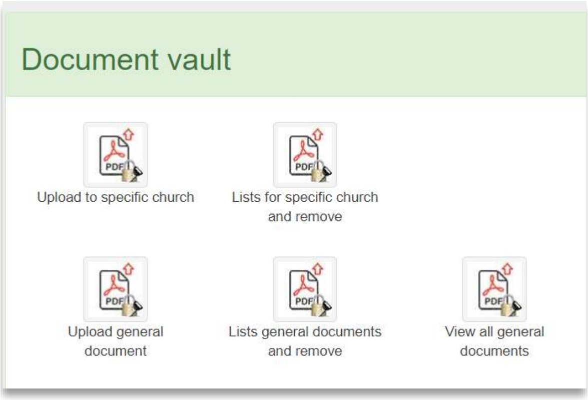
This gives an overview of the numbers of worshippers, children, youth and folk whom have taken communion each week, etc. This can hold historical records over many years. E.g.



Service Date	Church	Services	Full Attandance	Communion	Youth	Sunday School
06 Jan 2019	4	5	312	129	0	29
13 Jan 2019	4	5	310	111	0	24
20 Jan 2019	4	6	340	108	0	42
27 Jan 2019	4	6	338	101	0	42
03 Feb 2019	2	3	209	46	0	11
10 Feb 2019	5	7	394	106	0	61
17 Feb 2019	5	7	373	79	1	49

Document Vault:

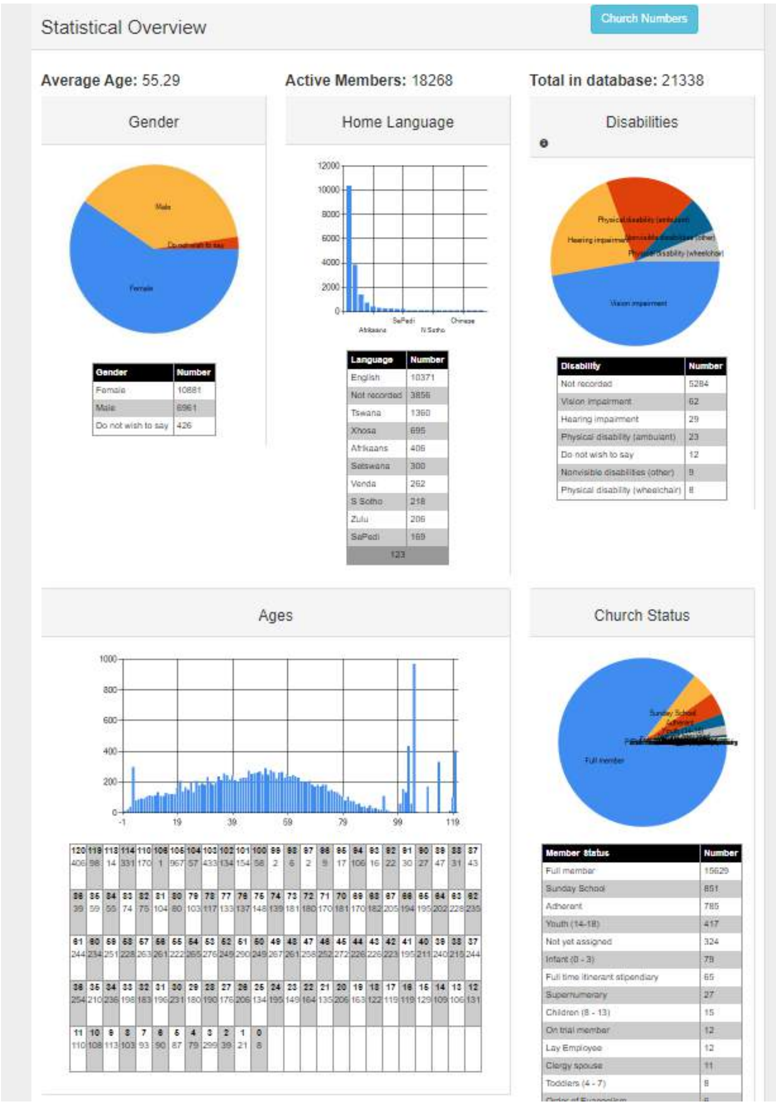
Here important documents can be stored. Example: Title Deeds, photographs of facilities and building for insurance purposes. They are stored for the Regional level or for a specific congregation.



Overview:

This is a powerful tool to see an umbrella view of the statistics of the region.

Here is an example of the graphs:

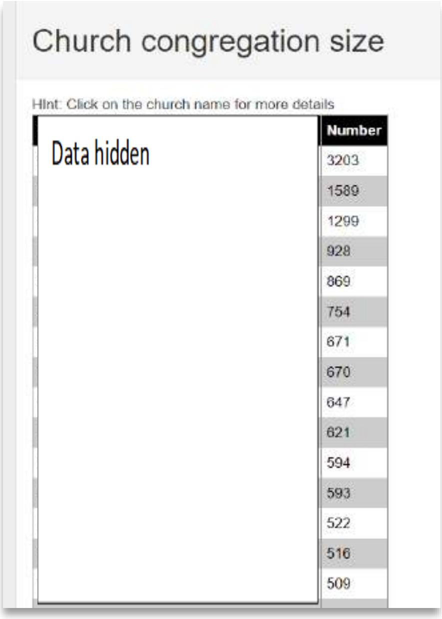


Are numbers important?

Note:

- There is a book in the Bible called numbers
- In Jesus' parable on the lost sheep, how did the shepherd know that one was lost?
- Not is interested in both quality and quantity: "Come follow me and I will make you fishers of people." Both/And.
- One person is as important as another, because God loves ALL people. The one who is unchurched and de-churched matters to God as much as the one in the church.

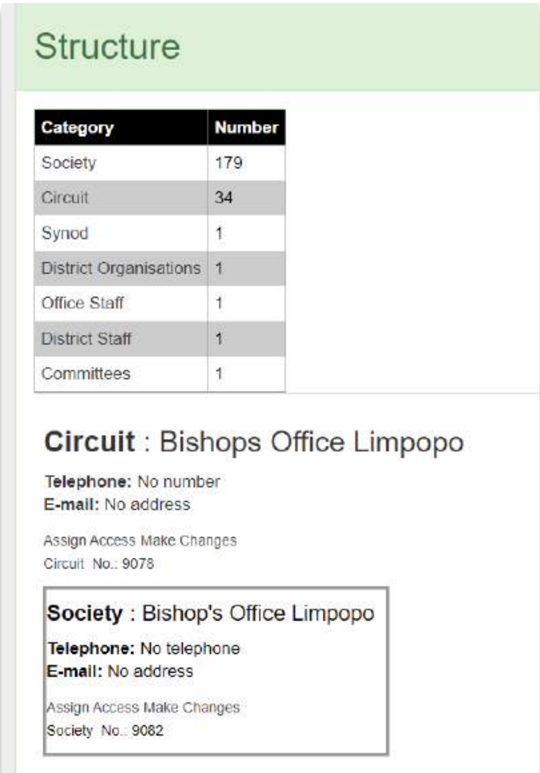
And the specific number of each congregation can be seen:


Church congregation size

Hint: Click on the church name for more details

	Number
Data hidden	3203
	1589
	1299
	928
	869
	754
	671
	670
	647
	621
	594
	593
	522
	516
	509

Structure:


Structure

Category	Number
Society	179
Circuit	34
Synod	1
District Organisations	1
Office Staff	1
District Staff	1
Committees	1

Circuit : Bishops Office Limpopo

Telephone: No number
E-mail: No address

Assign Access Make Changes
Circuit No.: 9078

Society : Bishop's Office Limpopo

Telephone: No telephone
E-mail: No address

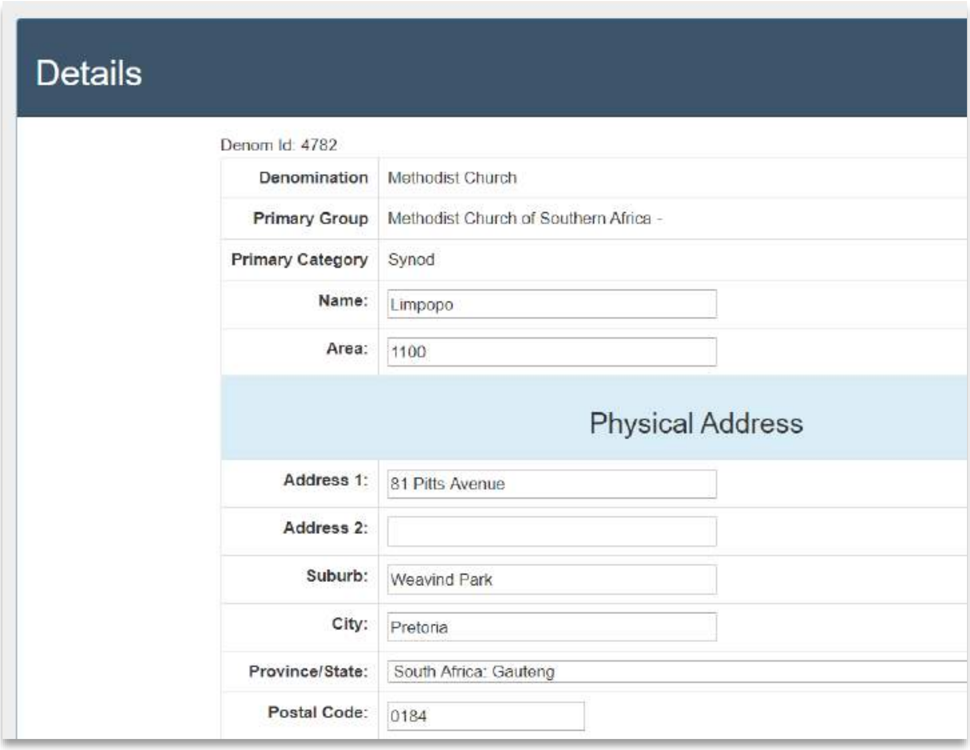
Assign Access Make Changes
Society No.: 9082

Here the whole Region's Structure can be seen. Here is where any Amendments are made, and another place in the System from where Access can be given to congregation's portals.

NOTE: If an additional congregation is needed, this can be easily done and is a service we offer, so kindly contact support@mychurchit.org with all the relevant information and this will be done for you.

Church Details:

Here the contact details are saved, which link into the Denominational websites, where applicable, and where historical information, statement of purpose, vision the like, can be recorded.



Events:

There is another Section (Ten) which outlines this aspect in more detail.

Significant events like Youth Camps and Conventions can be organised from this Portal. If online payments are involved, then another step is required at a Denominational level and will need to be activated for codes for online payments. There is a list of all events in the Region:

Creating an Event: The basics on how to create and event are: Click on 'Create and event' complete the fill in spaces and save.

You then can advertise via email and social media, inviting people to log into their Personal Portals, click on 'Events' and sign up for your scheduled event.

Section 8: Circuit/Deaconry's Portal

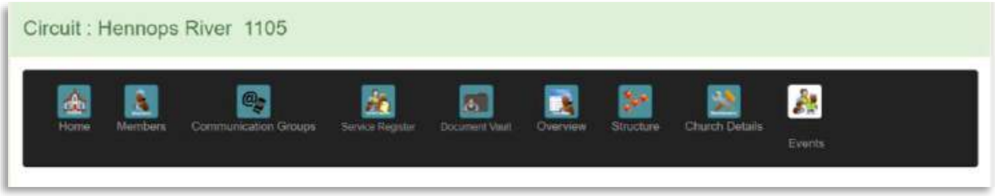
This is for Denominational use where a structure, like a Circuit or Archdeaconry, is used. This is the place for the local regional structure to use the System for their work:

Features:

Features of the Portal
• See an overview of the local area's membership demographics • Easily search for churches or members in your local area • Update and maintain list of regionally created groups • Update and maintain list and records of clergy and lay-leaders in the area • Update and maintain list and records of area's staff • Email or message area's leaders • E-mail or message all the church members in Bulk, or individuals

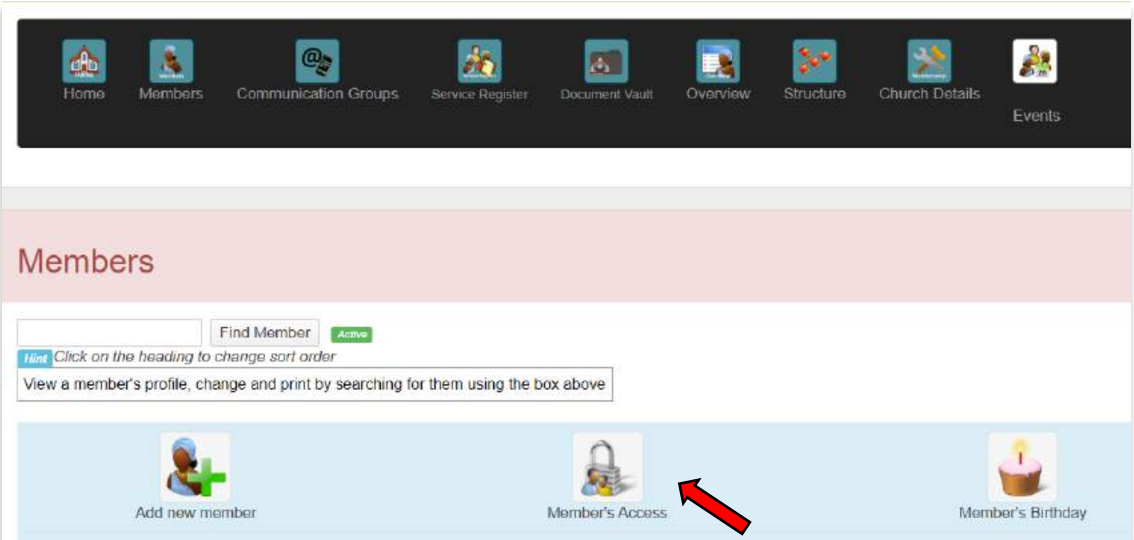
This is for Denominational use in a region like a Methodist Circuit. This is the place for an area's structure to use the System for their work.

As an example, we use a Methodist Circuit:



Access to this Portal

Access is granted in few ways: through the denominational structure; or an authorised person who already has access; or by arrangement with the MyChurchIT team by emailed request, as permission is needed.

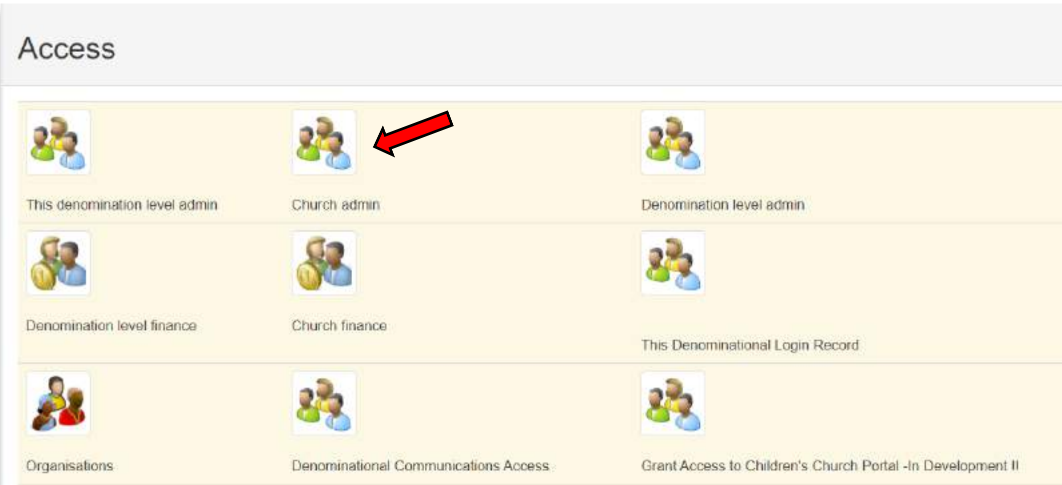


Those who already have access and authority, click on 'Members' and then on 'Member's Access':

There are several levels of Access granted to specific portals:

- **This denomination level admin**: For granting Access to manage the Portal's members, communications, see worship attendance, store documents into the Vault, and managing events;
- **Church Admin**: This level access to congregations and the Circuit/Archdeaconry;
- **Denominational level admin**: This shows the full list of who have been granted access to which portals at all the relevant levels
- **Denominational level finance**: The financial Portal for this level
- **Church Finance**: This shows the full list of those who have been given authority to use the financial portal at all levels from this one through to local church, including another way to give access.
- **This Denominational Login record**: This reflects a full record who logged and when for record and security purposes;
- **Organisations**: These are the Organisations specific to this level, not the Denominational ones which appear on the 'Home' page.
- **Denominational Communication Access**: Where specific people can be given the access to be able to communicate with all the members in a sub-sections/Circuits/Parish (see below under 'Communications')
- **Access to the Children's Church Portal:** This Access from this level, and not the local church level, and is granted only to those who have been given authority to work with children, because certain legal requirements are required.

We will come back to the above options later, but for now, click on 'Church admin':

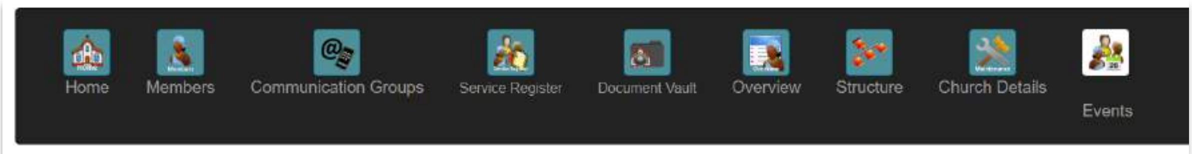


Then search for the person:

select the specific congregation for which access is to be granted, and then click on 'Grant Access'. A list appears of who has access at that level, the date and who granted the access for the records. Access can be removed by clicking on the REMOVE button.

What is available at this level

The opening page of the Portal shows what it offers:



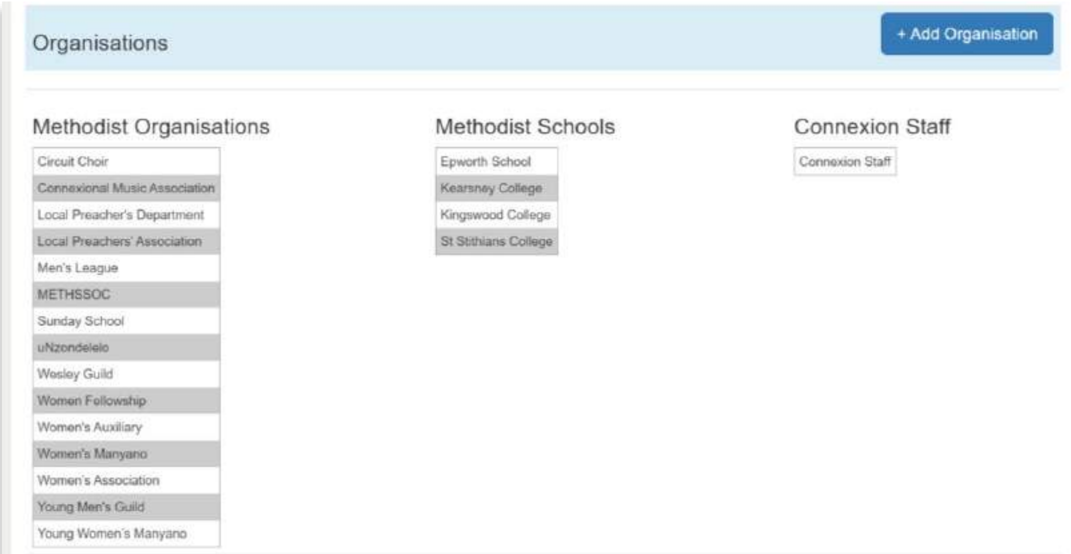
This Circuit level Portal includes these areas:

- **Home**:
  - To manage the Clergy and Lay Leaders Roles, positions and terms of service
  - For Organisations: These are the Denominational Organisations, Schools and staff
  - For District/Synod/Diocese/Presbytery Organisations: These are the Organisations which are particular to this grouping
- **Members**:
  - To add members, see all active and non-active members lists, members lists by Status and the Birthday list
  - For granting access: Grating Access to the various levels of the System;
  - To send Messages: Bulk emails and bulk messaging
- **Communication Groups**: Created groups for specific communication
- **Service Register**: An overview of the total worshipping attendance per Sunday through this Circuit Arch Deaconry, recorded per year.
- **Document Vault**: For safe keeping of important documents for private or public viewing
- **Overview**: Shows relevant graphs, statistics and numbers
- **Structure**: This shows the structure of the Circuits, Parishes, and extensions.
- **Church details**: Where the Circuit office addresses, and contact information is recorded
- **Church Events**: Where events can be created and managed from this level, as in Synod annual meetings or special functions.

Home:

Here the roles, positions and timeframes are recorded, and through which communications can be sent to each of these.

And then where the Denominational Organisations are managed:

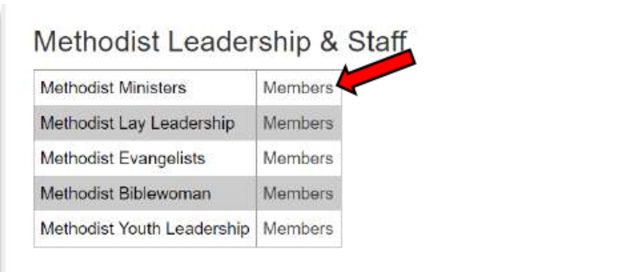


And manage the District Office as well as specifically mandated District Organisations:

Roles, positions and timeframes:

This is created so that you can see who is in what position/role and the terms of holding office (for how long), and then communicate with them according to those roles.

Clicking on 'Members':



In this section you can:

- Find a member
- See all the roles, stations and timeframes for each person
- See and overview of the ages, genders, status and statistics
- Send Birthday messages: A list from which we can email and send birthday messages
- Send emails and messaging to all or various groupings
- See the list of the all the denominations clergy

To see this:

Creating the list of Ministers, Clergy, Deacons, and other role players:

Click on 'See all members' to see all clergy:

To add new roles, click on + Add Leadership position, then complete the following:

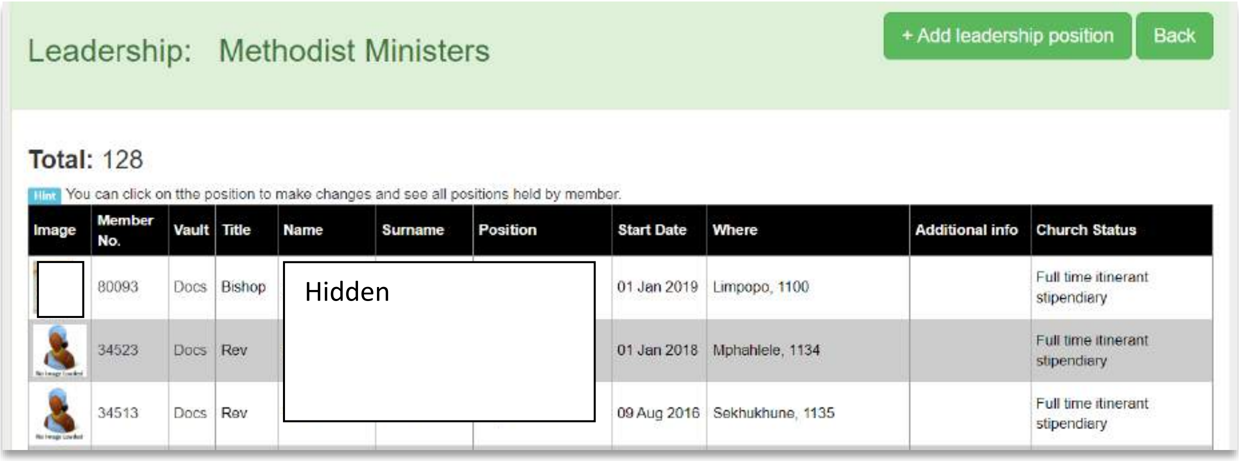
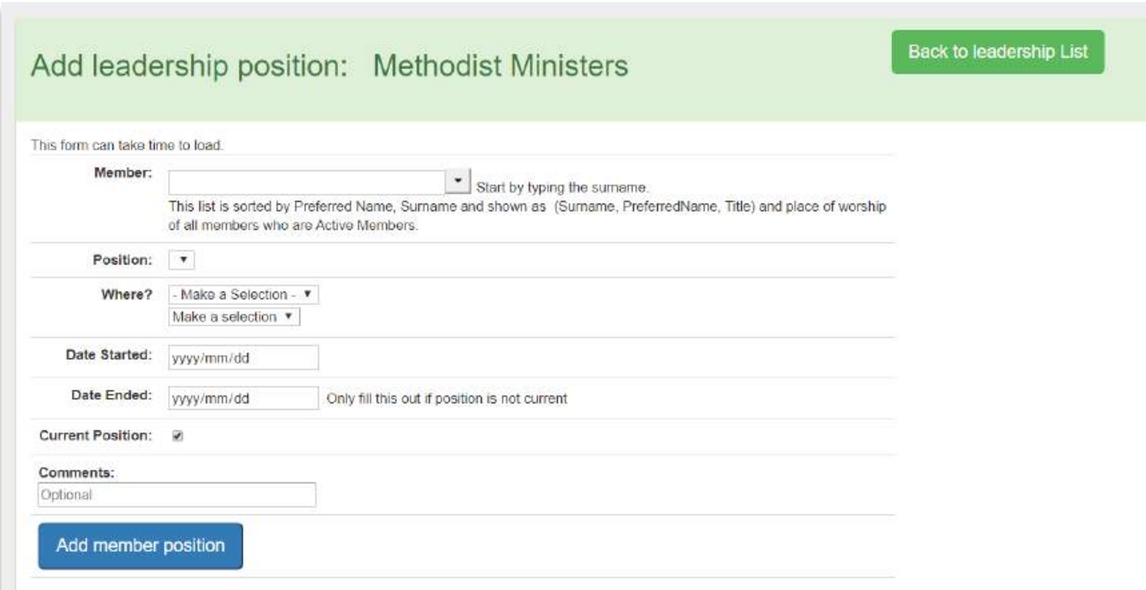


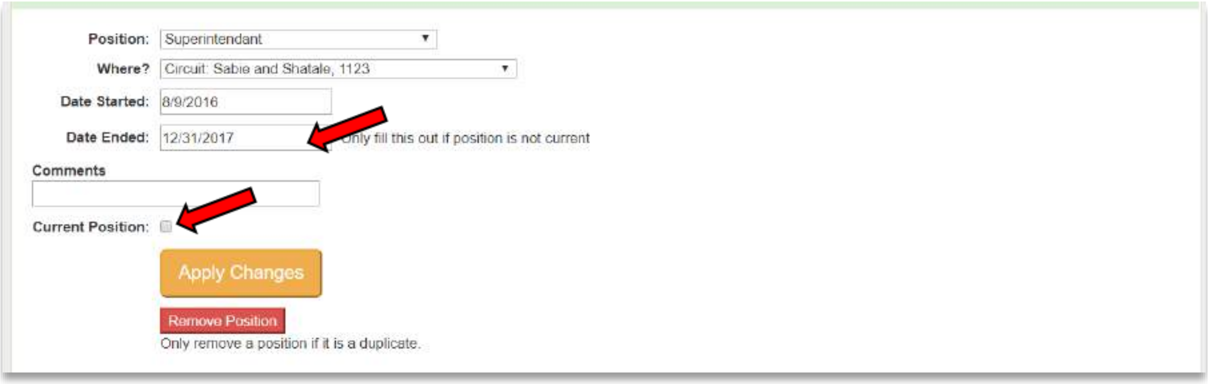
Image	Member No.	Vault	Title	Name	Surname	Position	Start Date	Where	Additional info	Church Status
	80093	Docs	Bishop	Hidden			01 Jan 2019	Limpopo, 1100		Full time itinerant stipendiary
	34523	Docs	Rev				01 Jan 2018	Mphahlele, 1134		Full time itinerant stipendiary
	34513	Docs	Rev				09 Aug 2016	Sekhukhune, 1135		Full time itinerant stipendiary



Once done, a list will appear. To make changes or show the end of the timeframe for the appointment, click on the role. If incorrect, click on 'Make Changes' and/or delete the entry.

	Position	Church	Start Date	End Date	Comments	Current	Date Added	Added By
Make Changes	Data hidden		09 Aug 2016	31 Dec 2017			24 Jan 2017	Rev Christopher Harrison
Make Changes			01 Jan 2015	31 Dec 2017	Check date		21 Feb 2017	Rev Christopher Harrison
Make Changes			01 Jan 2018				19 Jan 2018	[redacted]

If the term of the appointment or timeframe has ended, enter ‘Make Changes’ and enter the ‘Date Ended’ and untick the ‘Current Position’ box. Then ‘Apply Changes’.

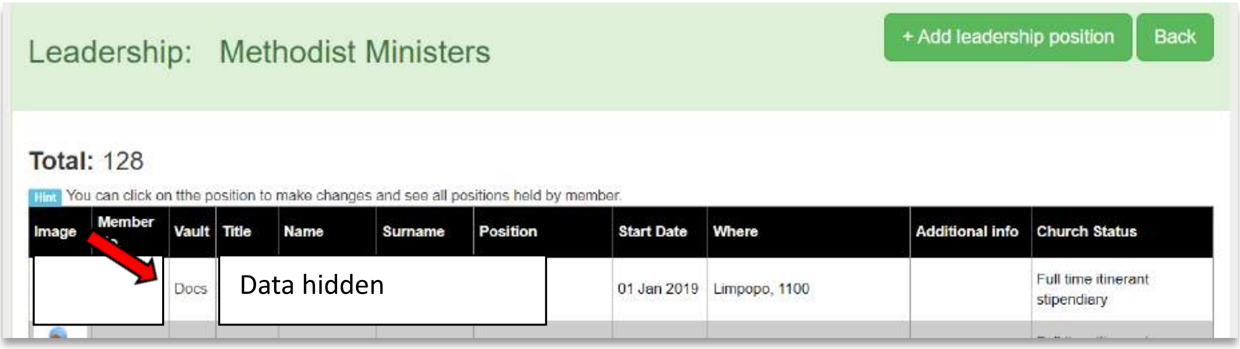


Lay Leadership Appointments:

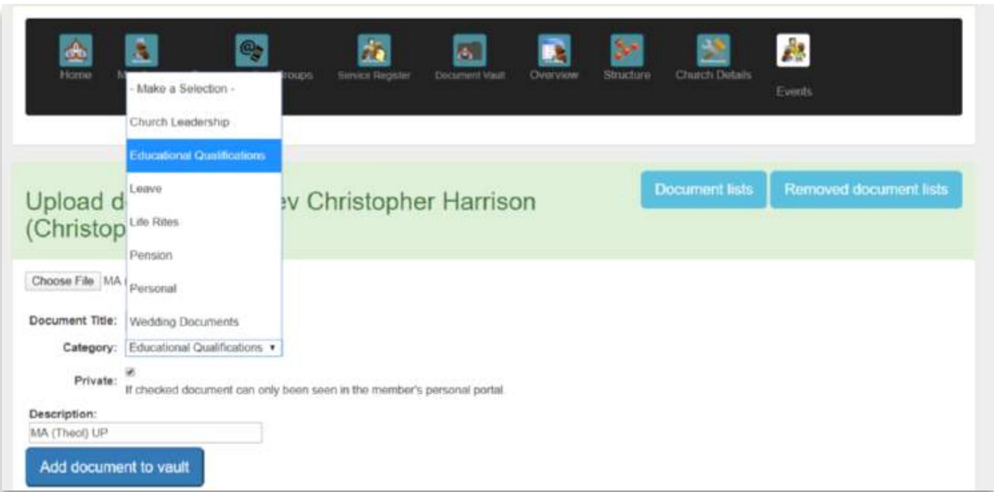
This is entered and applied in the same way.

Vault: Individualised

You can add important documents to specific Clergy Person’s Vault:



e.g. an Ordination Certificate or Qualifications:



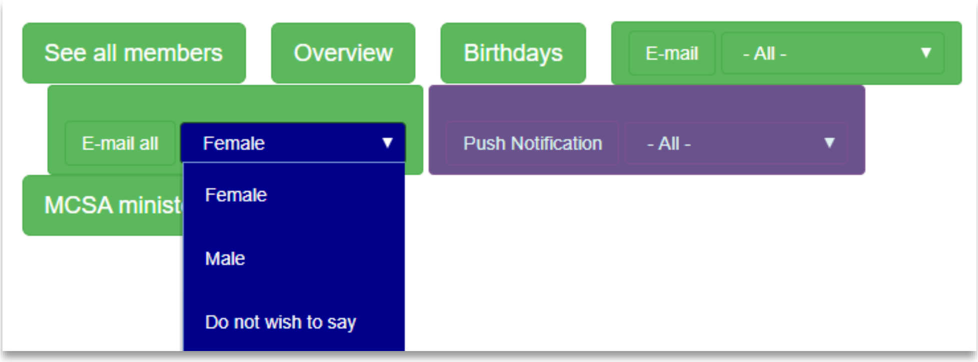
The Clergy/Minister’s ‘Overview’ shows statistics related to that portal: Average age, Genders, languages, Disabilities, Ages, Status’ and roles:

Messaging people: For example, to message a person on their birthday, click on the email and it generates an email which you can then personalise and send to that person:

Communications via email:

The dynamic of this system is that it is integrated so that, once a role is established, it links to the various relevant groups where this role or Status is required.
Note: This applies to ALL communications. The System automatically sorts the roles into emailing groups for ease of communication: e.g. ‘All’ or ‘Superintendents’ or ‘Parish Priests’

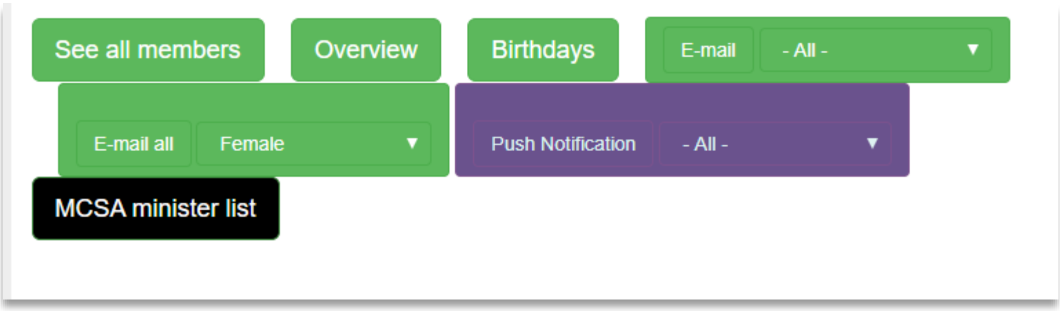
When sending a general email to all the members in the Circuit, there is also a ***sort*** function based on Gender. So, if you wish to send an email to all and only the ladies in the Circuit, here is where you do that:



The normal ways of sending emails exists, as in other portals, including setting up the mailing lists and even create a signature as a Jpeg to insert at the end of each email.

NOTE: The Bulk Messaging System is currently being improved to include WhatsApp and SMS.

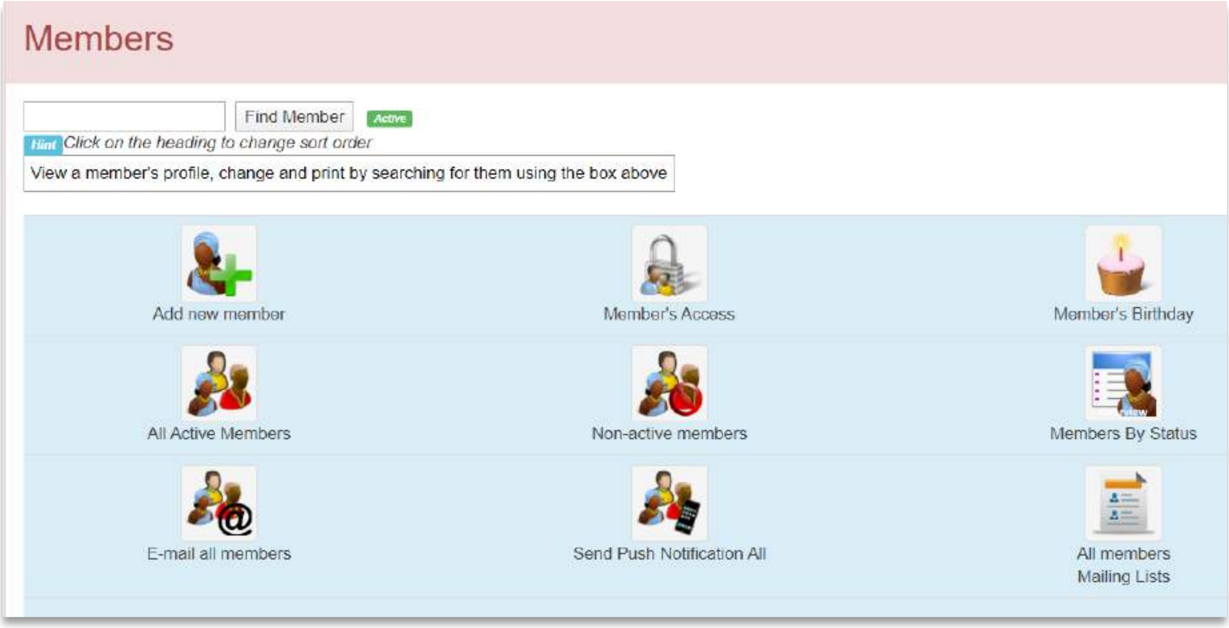
The full list of ministers in the Connexion/Province and Assembly are found here: e.g. under 'MCSA Ministers':



Members:

In the Members' section:

- Add a member
- Member's Access: Where access to the various levels of the System as grated and removed
- A birthday list for the whole region
- See all he active and non-active members in lists
- See members in lists by their Status (e.g. Theological Students)
- Communications: via email and messaging, and email reports

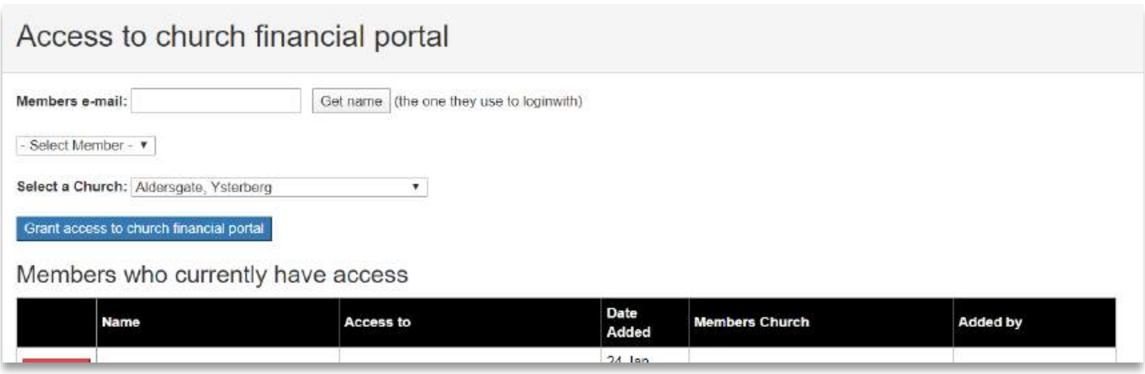


Much here is self-explanatory, so only three areas are highlight here, while others are explained above.

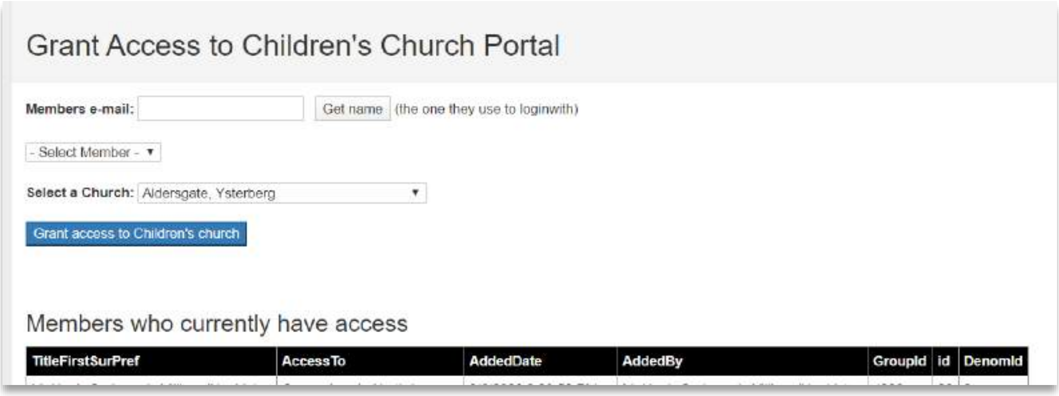
Access:

Specific Access is needed for

- **Finance Portal**: with extra steps for security, of inserting an email address in the required block, finding them and then grating them Access. This is if they are registered in the system. I list appears as to who has access for the various congregations.

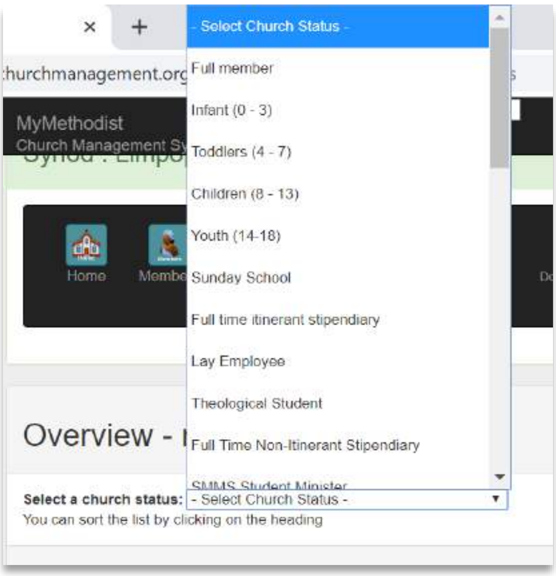


- **Children's Portal**: **ACCESS TO THIS PORTAL IS ONLY GRANTED HERE**: This has more explanation in the Section on the Children's Portal, but for is done for the security of child-care, and to be compliant with the Children Protection laws. Access to this portal is restricted, and permission is given at this level. This involved inserting an email address, finding the person in the pulldown, selecting the member and then granting them Access. A list appears of who has access to this portal.



Members by Status:

Here you can see a report in a list of all who are in a specific 'Status' in the whole region, by selecting from the pull-down:

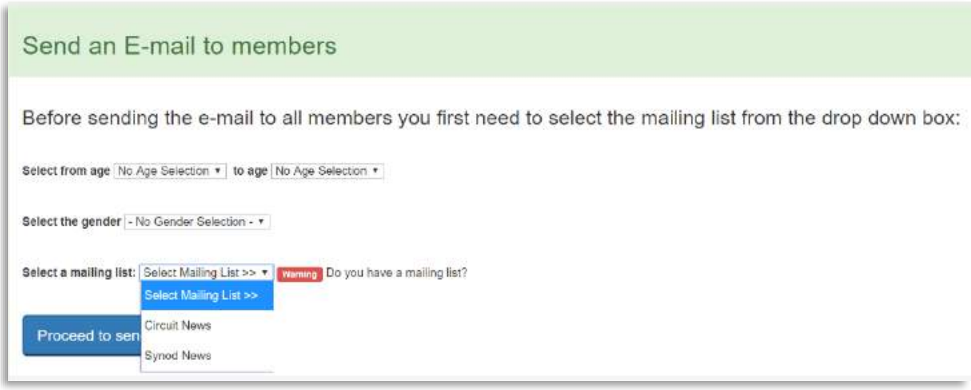


Email all members:

Under Mailing lists, you can create the lists you wish to use. E.g.:

Note: The 'Order: 500' means the lists if tiles to your various mailing lists is alphabetised and you can have up to 500 mailing lists.

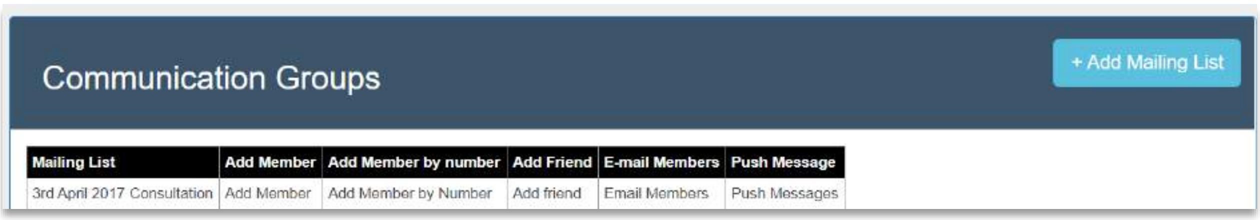
When emailing all members, click on "Email All members" and follow the instructions:



Once the Mailing lists is selected, click on 'Proceed to email' where the body of the email is typed or copied, spell-checked and edited before sending

Communication Groups:

You can create a group that you need in the System to make your communication easier. This applies where groups are needed that are not in the set groups by Role and Title. Add a mailing list and populate it with the required members:



Sending messages, adding and removing members (and even adding people who are not members of your church into the System which we call 'Friends'), enables management of communication very easier and for a number of role players.

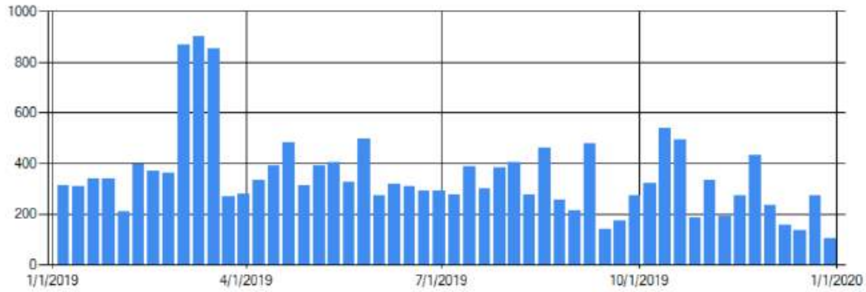
Worship Attendance Register

This gives an overview of the numbers of worshippers, children, youth and folk whom have taken communion each week, etc. This can hold historical records over many years. E.g.

Church Register

Select a year: 2019

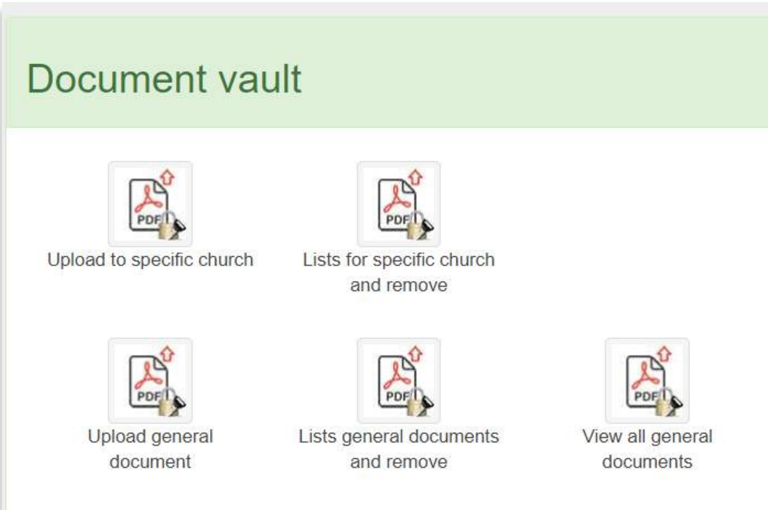
This record shows Sunday services only



Service Date	Church	Services	Full Attandance	Communion	Youth	Sunday School
06 Jan 2019	4	5	312	129	0	29
13 Jan 2019	4	5	310	111	0	24
20 Jan 2019	4	6	340	108	0	42
27 Jan 2019	4	6	338	101	0	42
03 Feb 2019	2	3	209	46	0	11
10 Feb 2019	5	7	394	106	0	61
17 Feb 2019	5	7	373	79	1	49

Document Vault:

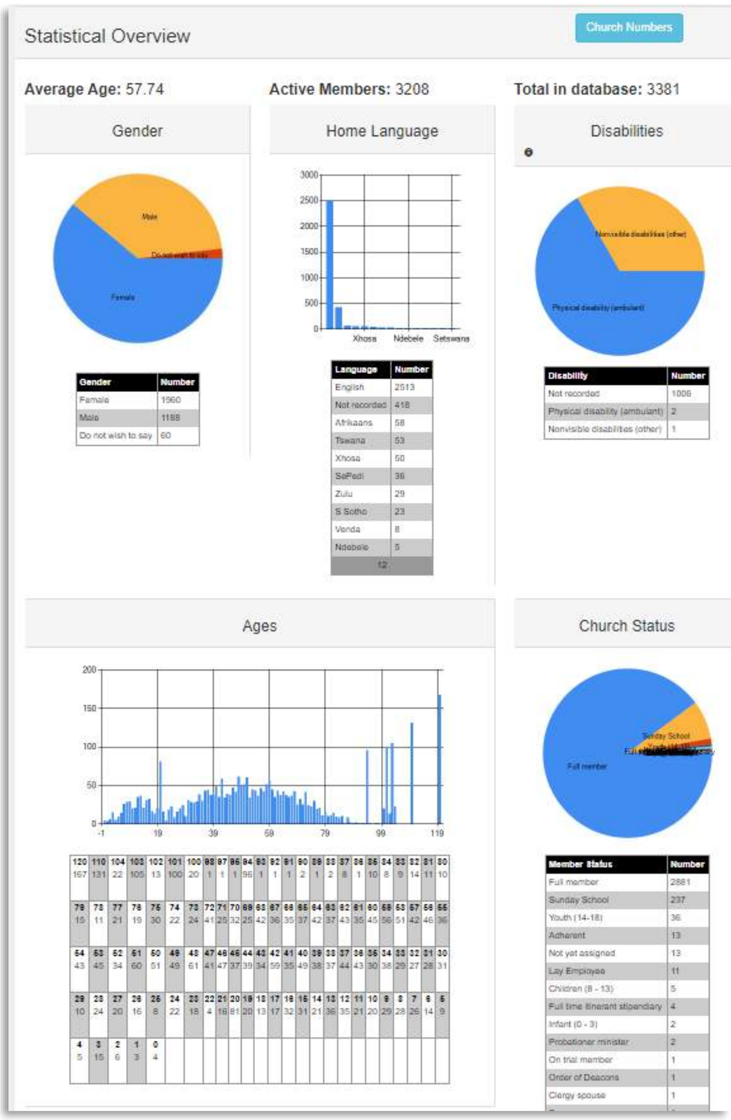
Here important documents can be stored. Example: Title Deeds, photographs of facilities and building for insurance purposes. They are stored for the Regional level or for a specific congregation.



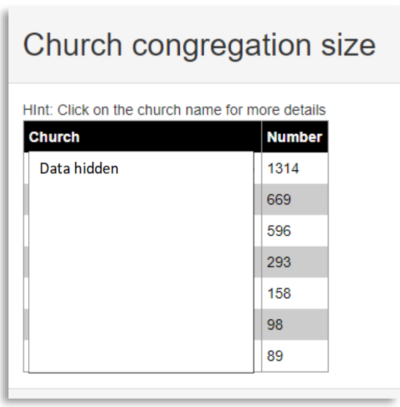
Overview:

This is a powerful tool to see an umbrella view of the statistics of the region.

Here is an example of the graphs:



And the specific number of each congregation can be seen:



Church congregation size

Hint: Click on the church name for more details

Church	Number
Data hidden	1314
	669
	596
	293
	158
	98
	89

Are numbers important?

Note:

- There is a book in the Bible called numbers
- In Jesus' parable on the lost sheep, how did the shepherd know that one was lost?
- Not is interested in both quality and quantity: "Come follow me and I will make you fishers of people." Both/And.
- One person is as important as another, because God loves ALL people. The one who is unchurched and de-churched matters to God as much as the one in the church.

Structure:

Here the whole Circuit's Structure can be seen. Here is where any amendments are made, and another place in the System from where Access can be given to congregation's portals. E.g.:

NOTE: If an additional congregation is needed, this can be easily done and is a service we offer, so kindly contact support@mychurchit.org with all the relevant information and this will be done for you.

Church Details:

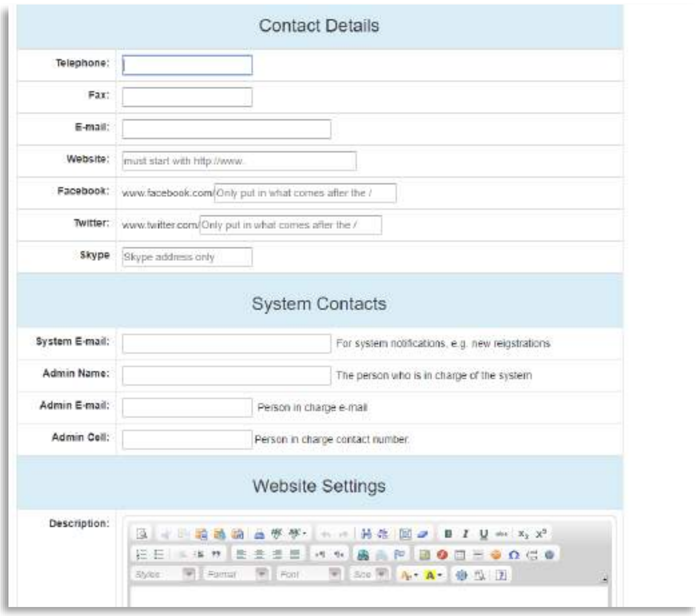
Here the contact details are saved, which link into the Denominational websites, where applicable, and where historical information, statement of purpose, vision the like, can be recorded.

It is viral that the Contact details are updated, as this is what members can see through the Personal Portal.

A record of the Social Media platforms can also be kept.

This is also often linked to the denominational for their search engine.

The System Contact is important if a new member is added and for information in System changes and updates.



Events:

There is another Section (Ten) which outlines this aspect in more detail.

Significant events like Youth Camps and Conventions can be organised from this Portal. If online payments are involved, then another step is required at a Denominational level and will need to be activated for codes for online payments. There is a list of all events in the Region:

Creating an Event: The basics on how to create and event are: Click on 'Create and event' complete the fill in spaces and save.

You then can advertise via email and social media, inviting people to log into their Personal Portals, click on 'Events' and sign up for your scheduled event.

Section 9: The Organisations' Portal:

This is for organisations, such as women's or men's organizations, guilds, institutions (Schools), and organisations (OC Africa, Fresh Expressions, Emmaus, Christ Healing Fellowship, etc.).

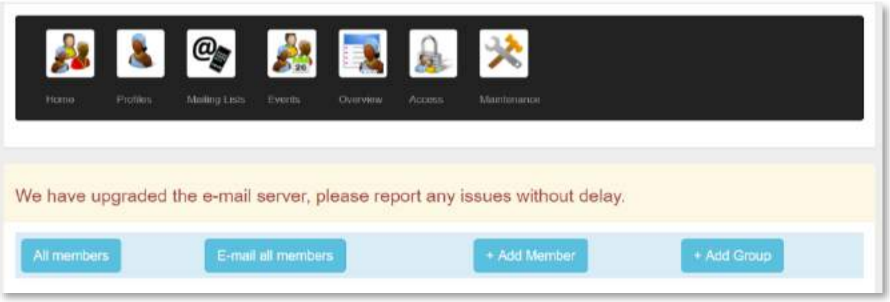
Features:

- See an overview of the organisation's demographics
- Manage list of members
- Set up and manage groups of people at the various levels
- View upcoming birthdays of members
- E-mail members or groups of members
- Send word messages through the Messaging System for Smart phones and tablets
- Set up events so that members can register and pay through the pay-portal

Setting up and maintaining the Organization's data

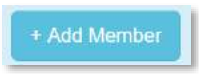
Setting up of the actual Organization can only be done at the Denominational level. So, if more Organisations need to be added, kindly contact Support@mychurchit.org or your denominational head office. At the Denominational or Organisational level, it looks something like this:

Having logged-in using the email address and password, this will appear:



The first step will be to add people into the System.

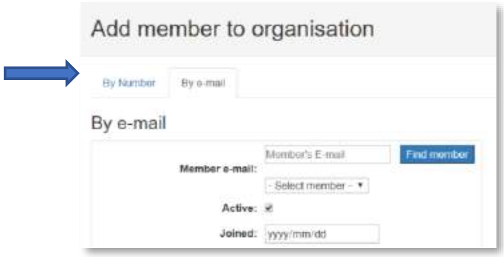
How to add people's data to the Organisation



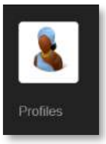
There are three ways to add a people's data:

Firstly, use '+ Add Member' for a person who is already in the MyChurch database as they are a **'member'** of a participating denomination and so have a member number.

You can enter either their MyChurch ID number or use the same email that they have in their profile on the System:



However, if the people are not in the system, there are a further two ways of inserting them and that is under Profiles:



Adding additional people using the Profiles

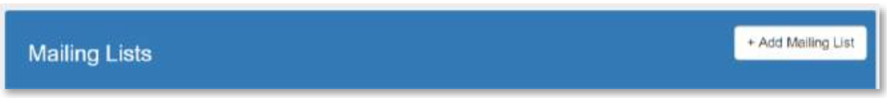
The additional two ways for adding people come within Profiles section:

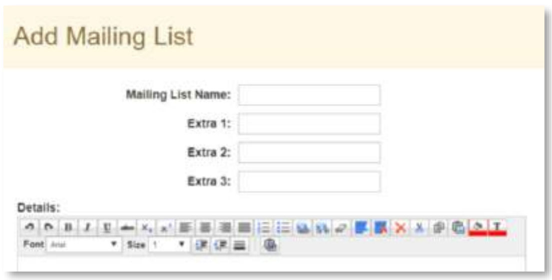
Add new Church member profile: By clicking here you can add the person into the system who belongs to a participating congregation, but the local church has not placed the data as yet, or cannot do it. You select the congregation from the pull-down list.

Add new organisation member profile: This is where a person is not in a participating denomination but is a part of the Organisation.

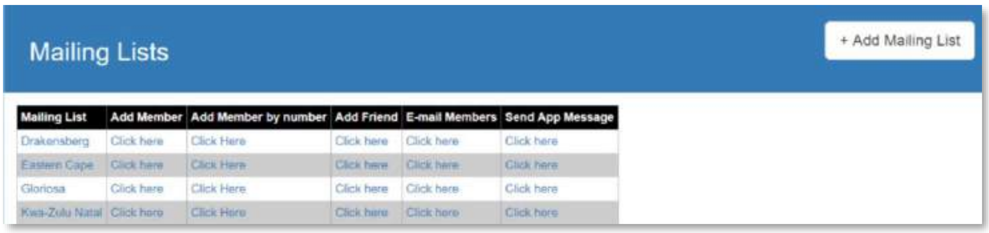
Making Lists:

To create a list, click on '+ Add mailing list' and add in the name for that list:





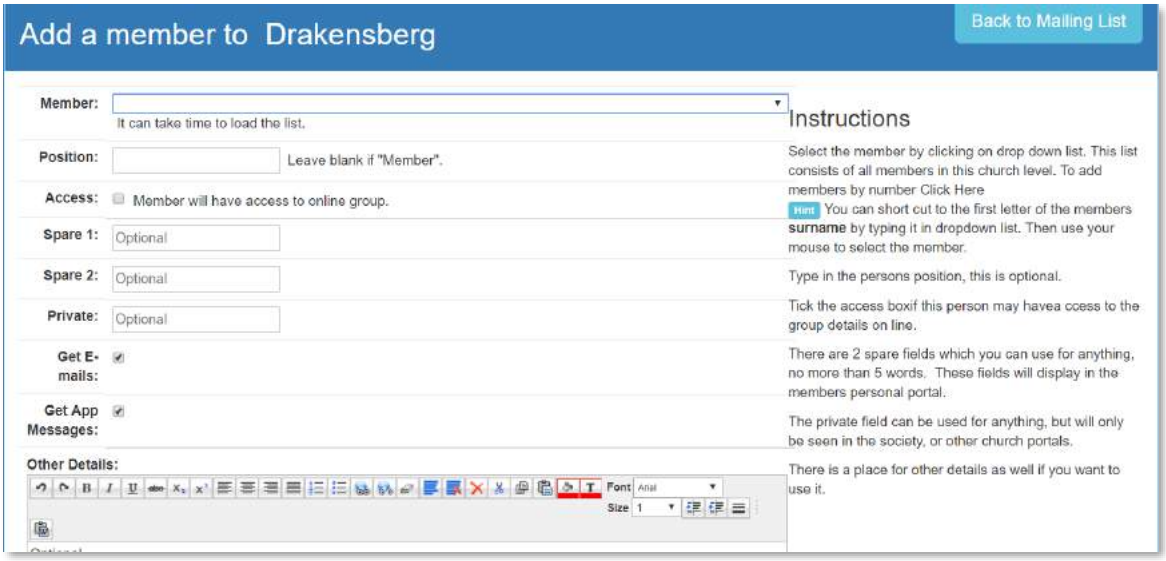
There is the capacity to create numerous mailing lists for many reasons, like this:



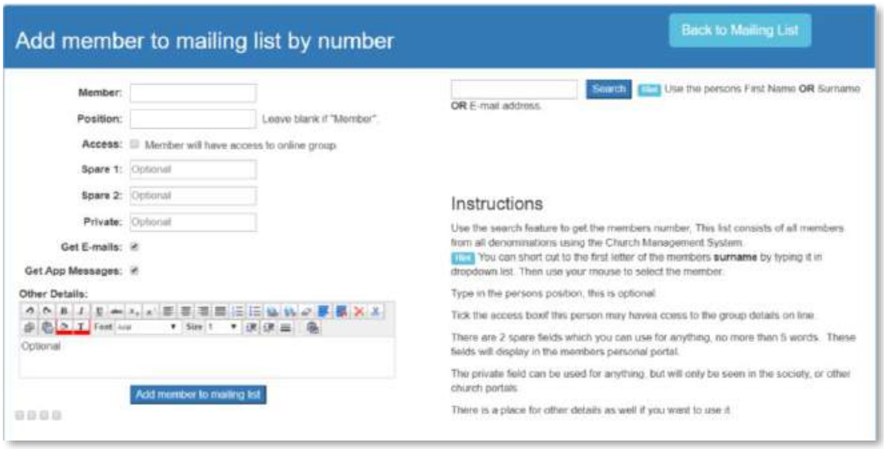
Add Member: The lists can be populated with people from your Profiles. This may take a while to do this, but you need only do it once. It is worth the effort for the long term.

The download takes a while also to gather the names, because the System searches through the whole list of all the people in the System so you can find the member. To do an easy search, type in the first letters of the system quickly and then select the member.

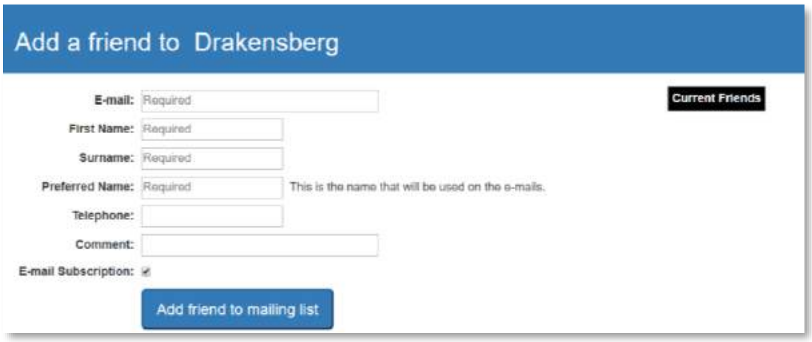
The instructions are in the column on the right of the screen to make it easy to follow, as seen below:



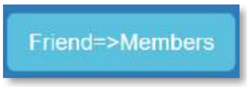
Add a member by number: for who are in the System already by number or email address:



Add Friend: This is for those that are not members or in the Profiles, but are individually added to the specific Mailing list. The list of the current friends will then appear on the right hand side.



Making changes/Search for a member: Both can be done at any time.



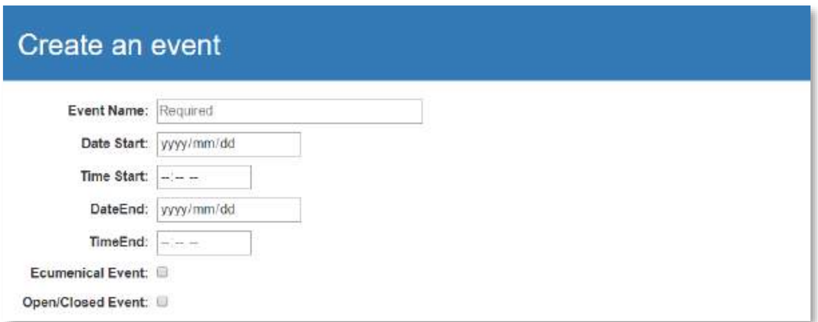
Linking 'Friends' to existing member's profiles

Where people are placed into an Organisation, but are already in the System, the System identifies the person via their email address, and offers the opportunity for the administrator to link them manually. The advantage of this is that when a member changes their data in whatever form, e.g. a new mobile number, the changes are made once across the entire system.

From time to time, the administrator needs to click on this Icon and see the list of people that have the same address and then you have the option to link them to the Personal Profiles.

Creating Events: The Organisation can create an event that will appear on the public pages open for anyone who is on the system to access for registration. E.g. A convention, a Synod or Conference.

Click on '+ Create and event' and set it up with the following details:



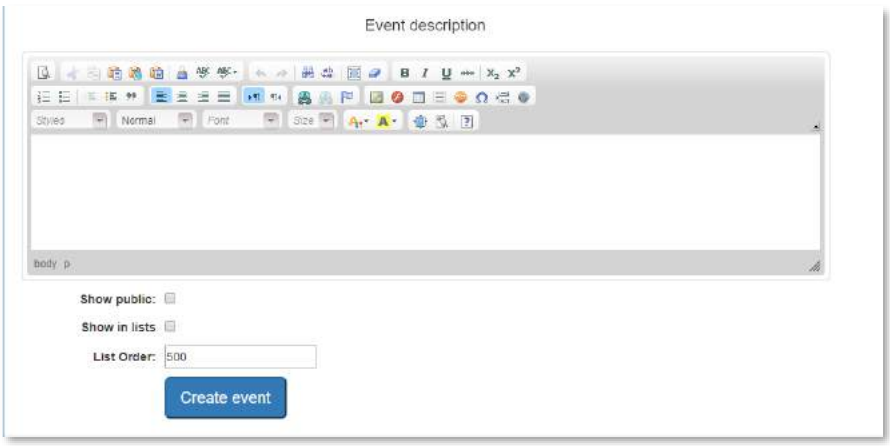
Ecumenical Event: This will be an event only for a denomination, but tick the box if this is an open invitation to all denominations and will be shown in the public Events box in the System.

Open/Closed: This still needs to be developed further.

The place the venue details:

Then the contact and Social Media details:

The finally a brief description of the event, and then adding ticks in the blocks to indicate whether this is to be shown in public forums in the System, and shown in the lists of events.



The result with be something like this:

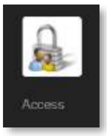
Adding data to Organization

This can be done by those who have the authority by having Access to the Organization, at regional and local levels. The regional and local levels can add members and change the data of members, but only for the members in their areas of responsibility.

Each registered and added member can see the list of the other Organization's members with their contact details. The system does this, because belonging to an Organization automatically gives permission to that Organization to know and share their details with the others within that Organization. However, if the member does not wish this, then they need to untick the second box at the bottom of their Personal Profile.

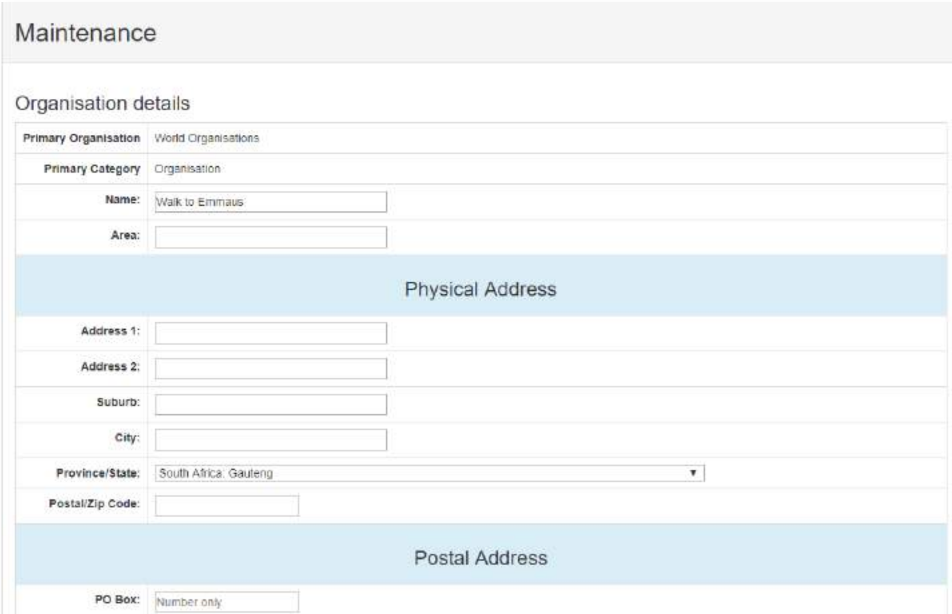
Overview:

The overview shows pictures of the average age of the people in the Organisation, languages, disabilities, spread of the ages and more.



Access: This is where the Organisation's administrators can give Access to whoever needs it for the period that it needed. Access can be granted and removed as people are appointed and end their terms of service. When clicking on this icon it will open to where you place in the person's email address that is to be granted Access, then selecting the member and finally clicking on the blue box as indicated:

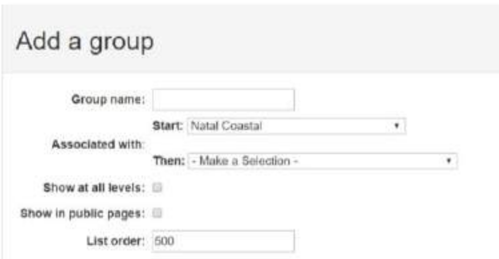
Maintenance: Here is where the important information and data of the actual organisation is kept for the System for the records and for support contact, and it starts like this:



Add a Group

This is found under the 'Home' section. Groups of people are formed for a purpose, e.g. Emmaus Lay Directors and populated with those who have been Lay Directors, for record keeping and communication.

When creating a new group, one needs to choose the name of the group and the area that it covers, and the levels at which it will be shown. One can create up to 500 groups at this time and the order that it is shown will be determined by the number:



The groups will be shown in a list in the Organization's Home screen:

Emailing

We use a secure bulk and systematized emailing system which personalises the emails through a mail merging facility.

There are two levels for bulk emailing: Everyone in the Organisation, or to people within group within the organization.

Emailing everyone:

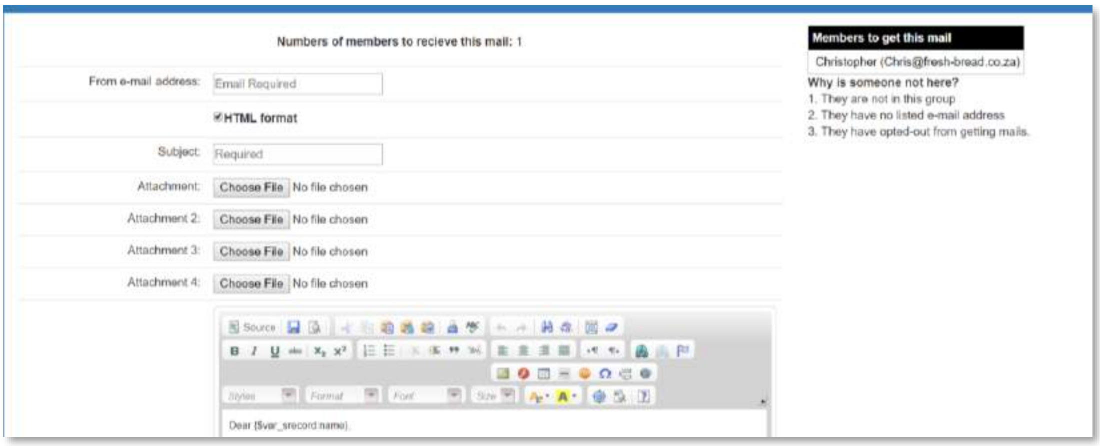
This is a bulk emailing System where:

- the sender needs to be specified to whom the replies will go;
- the the subect needs to be inserted;
- attachements (up to four) can be added, and Pdf's are recommended;
- the mail merge will work when the {$var_srecord:name} insert is left as is;
- all content is created by the author;
- adding pictures, website links, etc. can be done and all Word editing features;
- the reason people are receiving this, from whom this is sent is indicated, as well as an unsubscribe facility is shown, as required by POPI.

When sending this email, it will join a bulk email queue and it will be shown that you can exit the email while this happens.

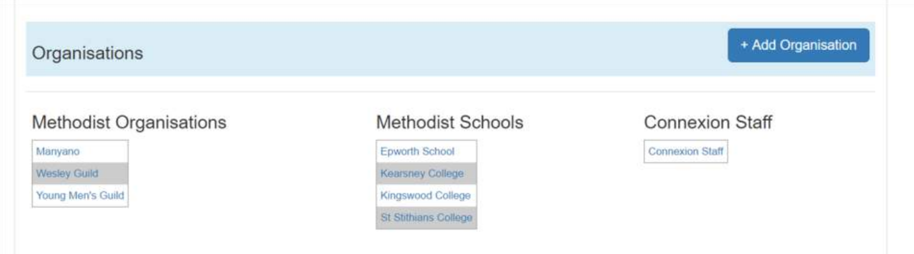
Emailing a Group:

If wishing to only send to a group, then go to the group list and click on 'Email' and it will show that it only goes to this within that group, reflected by the number who will receive this email. The same instructions apply here for manging the email:



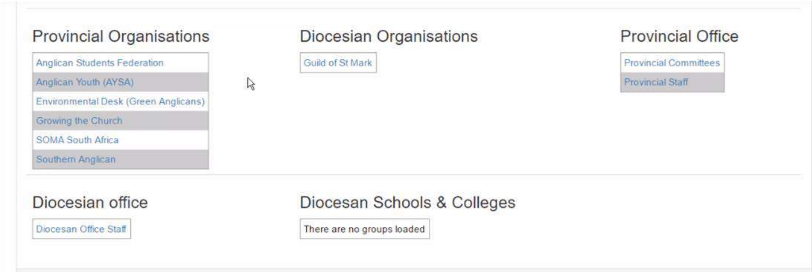
For a Denomination: Setting up and maintaining the Organization's Profile data

Setting up of the Organization can only be done at the Denominational level. So, if more need to be added contact your head office. At the Denominational level, it looks something like this:



Adding data to Organization

This can be done by the Organization, regional and local levels. The regional and local levels can add members and change the data of members, but only for the members in their areas of responsibility.



Each registered and added member can see the list of the other Organization's members with their contact details. The system does this, because belonging to an Organization automatically gives permission to that Organization to know and share their details with the others within that Organization. However, if the member does not wish this, then they need to untick the second box at the bottom of their Personal Profile.

Section 10: Events Portal

This has been fully developed for the Organisation Portal, and then this will filter through to all portals.

Features:

- See an overview of your event
- Use as registration for the event
- Securely track and monitor payments for the event
- Track the financial progression of your event

How are events seen in the System?

From time to time an event is advertises in the System, like the Anglican's Ablaze:

Each individual person, be they a visitor or a member of a denomination will be able to see information that you place into the System:

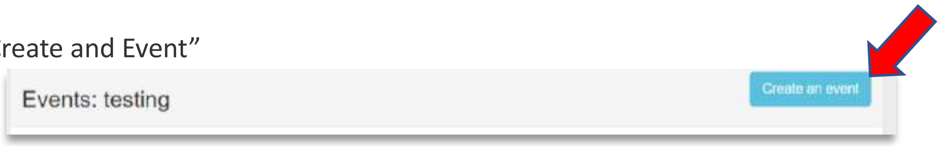
Types of events: (Seen in the Personal Portal by all members who are registered on the System)

- My Events: This show the individual for which events they have currently signed up;
- Past Events: This show the individual for which events they previously signed up;
- Private Events: These are the events that the local congregation's administration team have set up for only their own congregation, and can be seen by the individual;
- Open ecumenical Events: These are current and future events to which anyone is invited and can register.

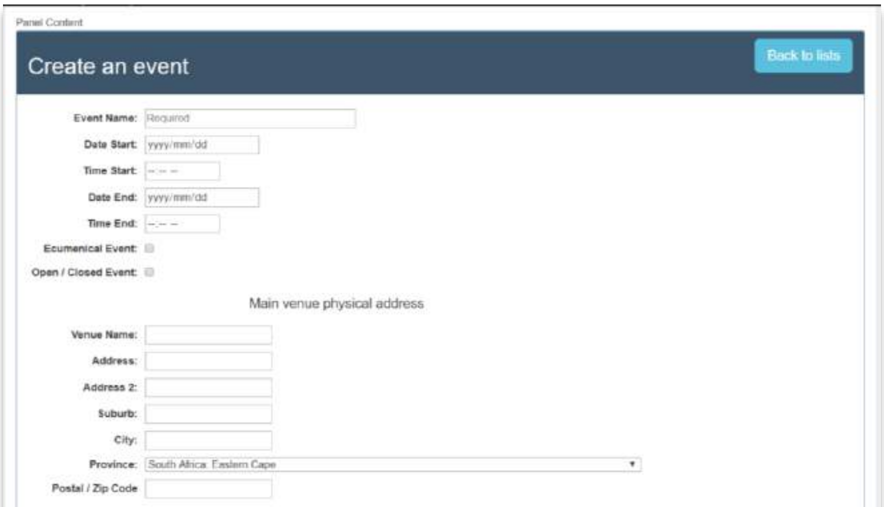
Creating an Event:

For example: In the Congregation's Portal go to "Events" (This is currently being developed further for better outcomes, hence the "testing")

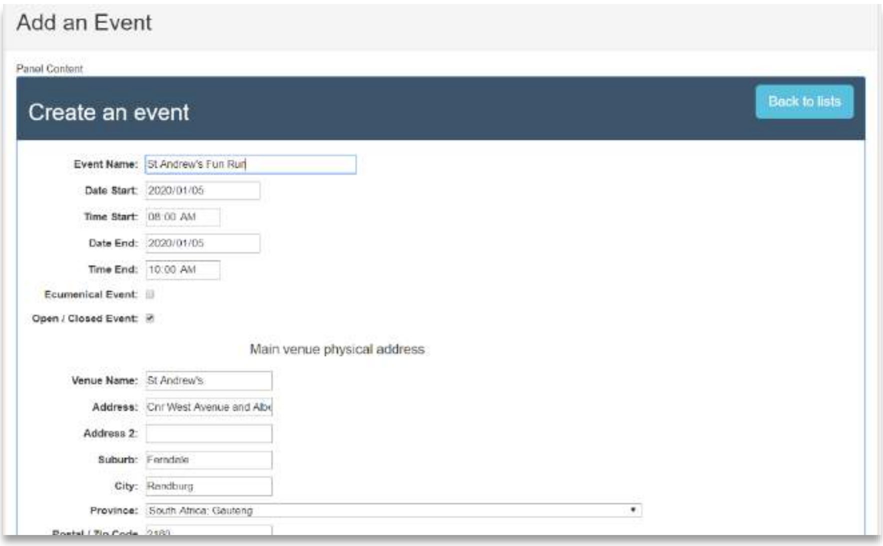
And go to : Create and Event”



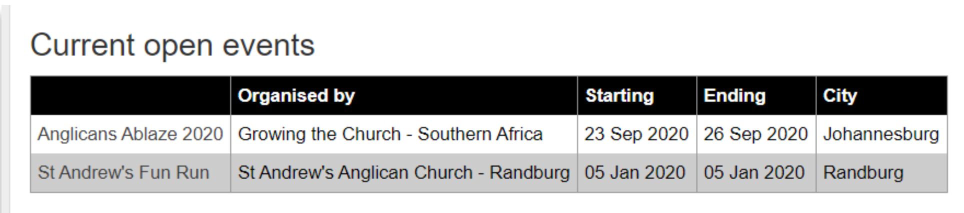
Set out the event information in full:



For example:



Which then shows this:

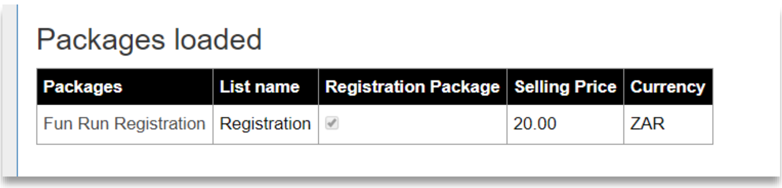


Current open events

	Organised by	Starting	Ending	City
Anglicans Ablaze 2020	Growing the Church - Southern Africa	23 Sep 2020	26 Sep 2020	Johannesburg
St Andrew's Fun Run	St Andrew's Anglican Church - Randburg	05 Jan 2020	05 Jan 2020	Randburg

Setting up the payment packages:

Which then reflects like this:



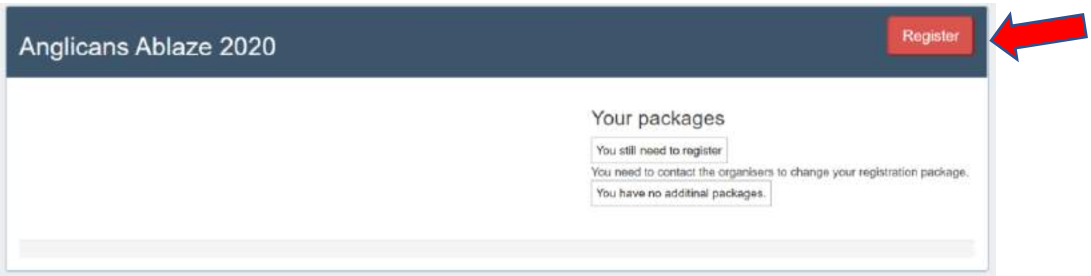
Packages loaded

Packages	List name	Registration Package	Selling Price	Currency
Fun Run Registration	Registration	✓	20.00	ZAR

How Participants Sign up for an event

The steps to be taken are set up in a way that is east to use.

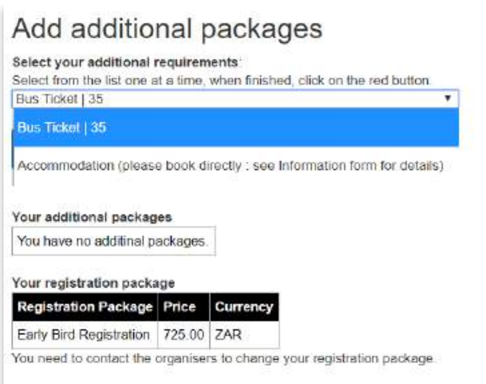
Step one: Choose the event.



Step 2: Register for the event:
When an event is chosen, it will show the individual where in the process they are, be it that they still need to Register or that they have registered and for what package they signed up.

Step 3: Choose Options:
Having clicked on the Register, the options are offered from which they choose and how they wish to receive communication, for example:

Step 4: The additional packages are shown from which they choose:



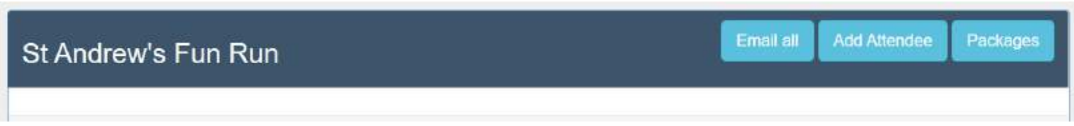
and then conclude this screen by clicking on Finish with Packages

Payment by participants for the Event:

This will take you through the steps for payment that need to be followed and this will be confirmed in Current Events as something like this:

Managing the event:

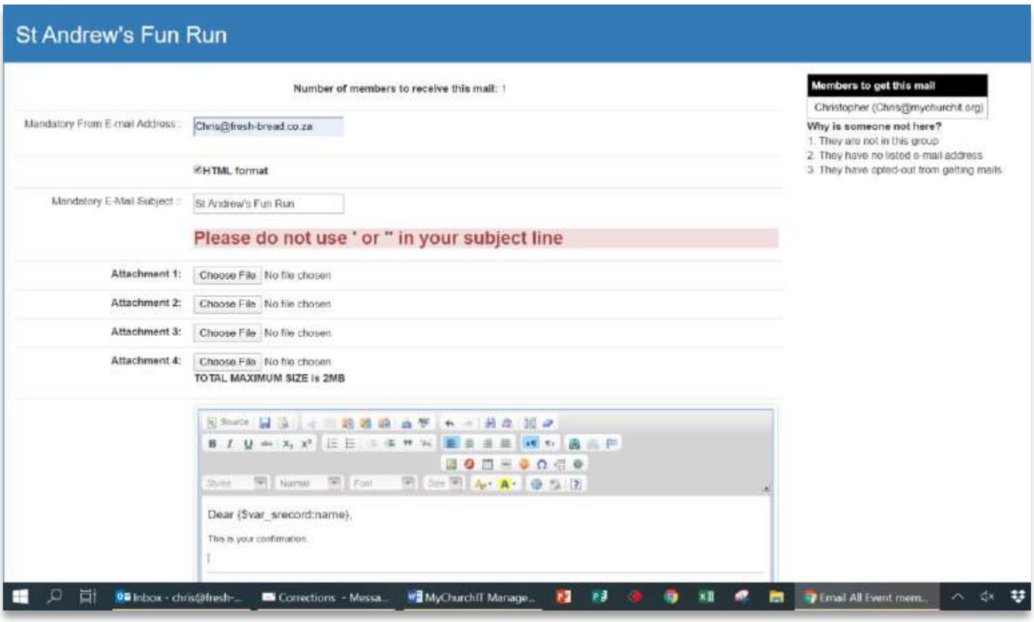
Having set up the event it appears under events for the congregation:



The people can register, and the administrator can add a member to the event:

Communicating with Participants:

The administrators can email all participants in the event, by going to Email all and this will appear for you to complete and send:



Tracking payments and finances for the event: To follow

Section 11: Trouble Shooting

We wish to serve you and wish for the system to do that well. We appreciate all the comments and help to make this possible.

I cannot get internet connectivity	Check on the internet availability. If the internet is working, then reboot the computer and try again.
My search engine is not connecting me	It is important to exit the search engine and try again. If that does not work, try another alternative from the options Chrome, Edge, Firefox etc.
I cannot see aspects of the system	This may be a 'cookie' problem that can resolved by a technician.
An error on a yellow screen occurs when I try an action	Go back a step and see if you have followed the instructions. For example: The 'Dates' have a pull-down screen, so use that to select the date, and not insert your own dates manually. If it happens despite follow the instructions, please take a screen shot of the error email it to us, informing us where you were in the system at the time. We will resolve this as soon as possible.

Section 12: Frequently asked questions:

Is this compliant with POPI requirements?

The Protection of Personal Information Act 2013 (POPI) refers to South Africa's Protection of Personal Information Act which seeks to regulate the Processing of Personal Information.

The obligations under POPI as it relates to the MyChurch Management system includes:

- only collect information that you need for a specific purpose
- apply reasonable security measures to protect it
- ensure it is relevant and up to date
- only hold as much as you need, and only for as long as you need it
- allow the subject of the information to see it upon request. [1]

The system and participating Churches meet these obligations due to:

- The fact that the data belongs to the various participating Churches, they are responsible for collecting and maintaining the accuracy of the information that they need for their purposes. Each congregation only gathers information for and from the people who have chosen to be connected to that congregation for whatever reason.
- The deleting of records is the responsibility of the MCM system on written request from the exact Church to which that person was connected. The archiving of data, as the need may arise, is done by the system, but due to the requirement of churches to keep records for

[1] https://www.popi-compliance.co.za/start-here/

future reference the archived data of such persons, for instance the deceased ones, can be re-accessed.

- The MCM as a system is stored on a dedicated server and is backed up daily;
- Everything reasonable has been done to keep the members private information safe;
- The participating person can see all their captured information on the MCM system, once they have registered, using their 'user' name (their email address) and their own created password;
- The security levels have different options for each member in their personal portal. The only other people who can change the information are those appointed officials from the congregation who have been given the right to 'access' the MCM data;
- On emailing another member: When a member who is on the system wishes to send an email to another person from the system, they will only see the names and not the email address. Only if the recipient person chooses to respond they thereby give their permission to connect.
- Personal information seen at different levels:
    - Members of my Congregation: When this box is ticked in the personal profile portal, the other members of that congregation can see each other's names, mobile number and Skype address, and can email but cannot see the email address. This is like a local telephone book (either in paper version or electronic version). The system does not allow a download of a spreadsheet with the names and emails addresses in order to prevent unwanted mass emails.
    - Members logged in: When this box is ticked, any logged in member, in special circumstances (e.g. attending an event), can see the member's names, mobile number, Skype address, and can email but cannot see the email address.

Who owns the data?

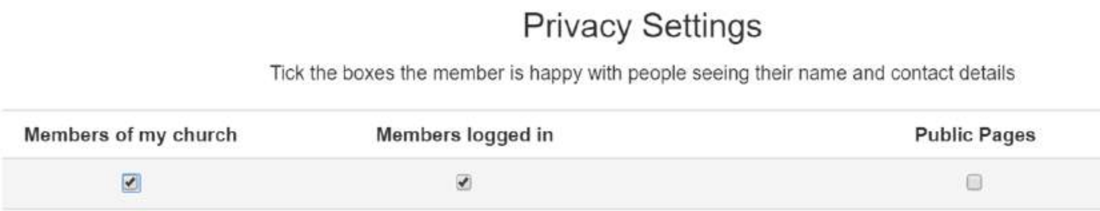
Please remember that the data belongs to you and you can login to change and update your details whenever you need to. People entrust their information to the church where they belong.

Who can see the personal information?

The system has been designed so that it can be used in different ways: It can be a like a telephone directory for those in the congregation, or just used by the office for a membership system. The benefit of the system is that individuals can choose who sees their information.

Right at the bottom of the profile there is Private Settings. If **Members of MyChurch** is ticked then the system can serve as a congregational telephone directory and all local church members can see the contact information, except you cannot see the email address, but can still email from the system.

If **Member logged in** is ticked, then the system can serve as a denominational directory. The Public Pages on relate to Denominational Officials.



How is the Costing worked out?

We have seen the costs of such a system and worked on what is viable and yet affordable for local churches. The fees cover:

- the costs for the servers and data security and

- the small staff team and team of consultants;

The authorised Licensees who service the clients with marketing and first-line support.

Please contact us so we can work out a price together.

Why does a church have to pay for the use of MyChurch system?

This project is run by self-supporting missionaries **with the blessings and validation of their churches** in Africa. We therefore have to raise our own funds to bring this to the Church. This is a part of the financial support.

MyChurchIT pays the developers and support staff a basic salary, but also pays for the world class hosting servers and security.

To do this we raise funds by invoicing for a fee.

Why is it so much cheaper than other systems?

We are not doing this to make a profit but to cover our expenses.

What happens if it does make a profit?

The system is run by a Non-Profit Company, MyChurchIT NPC 2019/271778/08, and so no one person profits from it. It supports missionaries and any surplus will go into mission and evangelism.