



# Get to Know Your ChMS

## Session Handout

## FIRST TIME GUEST TO NEW MEMBER

### GUEST FORM

When a Guest Form is filled out it then is processed by a Workflow to pull in the data.



#### Check In Contact Form

##### Name

##### What Area of Ministry Do You Want to Hear About?

☐ Children's Ministry ☐ Youth Ministry ☐ Small Groups Ministry  
☐ Adult Ministry ☐ Finance Ministry ☐ Other

This question will help me customize your presentation experience and focus on areas of ministry you are most interested in.

##### What Roadshow Session Are You In?

☐ Elevate Event Management in F1 Go ☐ F1 Go Check In Suite  
☐ Get to Know F1 Go

## WORKFLOW

Workflows are used to process data from a form and perform tasks such as adding the person to the database, sending a welcome email, assigning a staff member to follow up and sending text messages.

The screenshot displays the 'Ministry Workflows' configuration page. It features a 'Name' field with a dropdown menu and a 'Description' field. Below these, there's a 'Form Submission' section with a 'When the following form is submitted' dropdown. A 'Map' section contains fields for 'Name', 'Full Name', 'Email', 'Cell Phone Number', and 'Cell Phone'. To the right, there's a 'Send' section with options for 'Email', 'SMS', and 'Interaction'. The 'Email' section includes checkboxes for 'The person', 'The person's parent', and 'The person's spouse', and a 'Specify email for "Reply to"' field. The 'SMS' section has a 'Send individual emails to recipients' checkbox. The 'Interaction' section has an 'Add Action' button.

## PROFILE

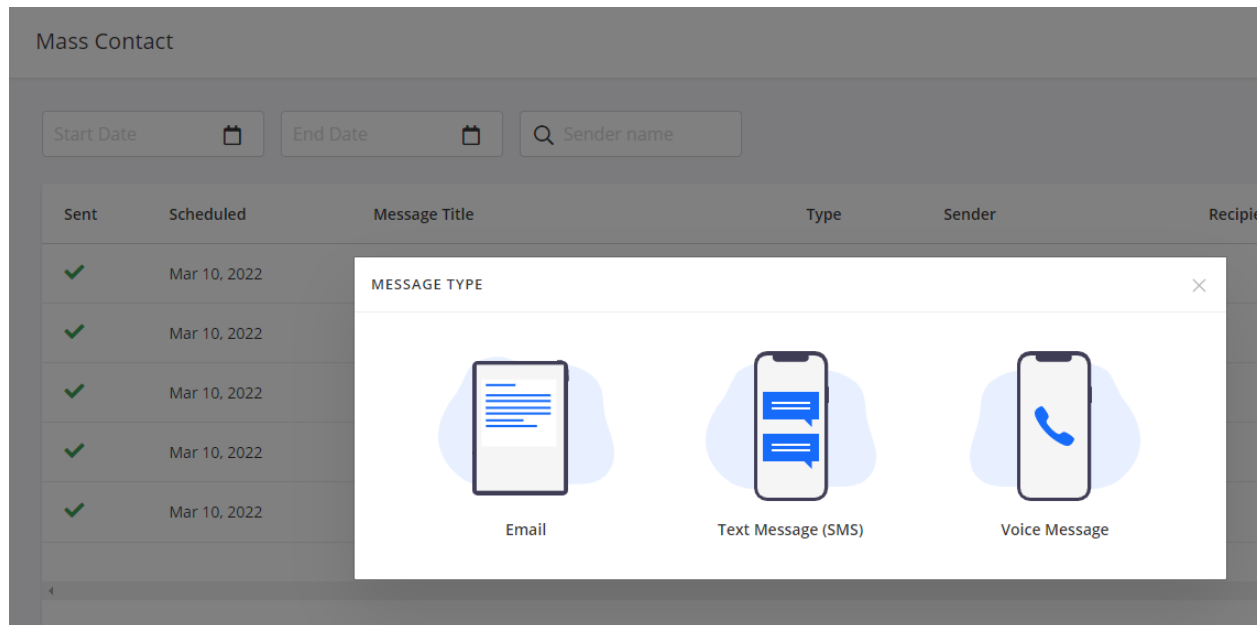
When a record is created in the database their data is displayed on their profile page. Basic information is tracked and displayed on this page.

Matthew McMaster

The screenshot shows the 'Profile' page for Matthew McMaster. The page has a navigation bar with tabs: 'Profile', 'Family', 'Timeline', 'Giving', and 'Account'. The 'Profile' tab is selected. The main content area is divided into two columns. The left column contains a profile card for Matthew McMaster (Male) with a photo and a 'Total Attendance' section. Below this is a 'Contact Info' section with fields for 'PHONE (CELL)' (972-978-7660) and 'EMAIL' (matt.mcmaster@ministrybrands.com). The right column contains a 'Family' section with a 'HUSBAND' entry for Matthew McMaster. Below this is a 'Notes' section with tabs for 'PERSONAL' and 'CHILD CHECK-IN'.

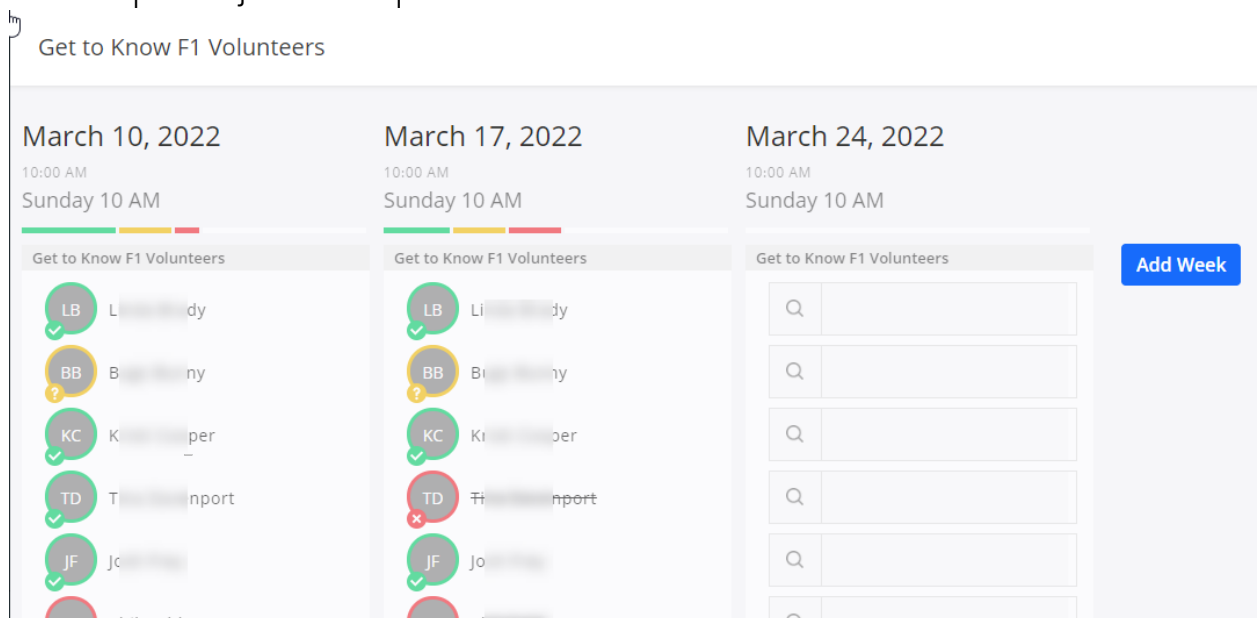
## MASS CONTACT

This area of the system is used to communicate with individual records in the database. Mass Contact can be an email, text message or pre-recorded voice message.



## SCHEDULES

Schedules are used to assign volunteers to serve in areas of ministry. They can get email or text notifications alerting them that they have been assigned to serve. They can accept or reject the request to serve.



## GIVING

Giving is entered to help keep track of how the individuals in the database are contributing to the church.

Giving

Input Giving

Input Pledges

Input Giving ⓘ

### Batch

Online Giving Batch # 20595 - 05/01/2022 ✎

Expected Total: \$175.00

Created By: null null on 05/02/2022 9:58pm

Date Received: 05/01/2022

[View entries already in this batch \(5\)](#)




Choose a different Batch

Contribution Date

05/01/2022



Defaults to most recent Sunday

Individual	Amount ⓘ	Category	Check Number	Notes
 Matthew McMaster	\$ 100	General ▼	Cash	
 Beckie McMaster	\$ 5000	General ▼	1234	
 Bob Vanderploeg	\$ 1500	General ▼	Type c for cash	