



# InFellowship Groups Manual

## Standardized Protocols

**Date Last Revised:** December 12, 2013

**Document Revision #:** 2.0

### **FELLOWSHIP'S PROCESS INNOVATION TEAM**

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## Purpose

The purpose of this manual is to:

1. have documented processes for all staff members to ensure the data integrity of our FellowshipONE database
2. to cross-train our staff members so more than one person knows how to do major workflows within F1

## Taking Attendance

To track attendance for InFellowship Groups, after you select a group you lead, you will see the **Attendance** tab as shown in the image below. Simply click the **Attendance** tab and then click **Enter Attendance** to get started.

Next, select the date of the meeting from the drop-down menu and choose either **yes** or **no** to answer the question regarding whether or not your group met. **Yes** is the default selection. If your group met, you can select all the group members by clicking the box in the header bar of the roster or select members individually by clicking in the box next to a group member's name. Make sure you click **Save attendance** at the bottom of the screen when you are finished.

Note: If your group held an unscheduled meeting, see [Attendance for an Unscheduled Group Meeting](#)

### Plotts, Holly; Laser, Sarah

Post attendance for group meeting on...  
Wednesday, November 20, 2013 at 6:30 PM - 8:30 PM

Did this group meet?  
 yes  no [Back](#)

Members		Leader	Member
<input type="checkbox"/>	Alexis Burns <a href="mailto:alexisburns@gmail.com">alexisburns@gmail.com</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Annie Plotts <a href="mailto:annieplotts@gmail.com">annieplotts@gmail.com</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Ashton Holmes <a href="mailto:ashton654@hotmail.com">ashton654@hotmail.com</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Becca Condo <a href="mailto:condointheskyes@yahoo.com">condointheskyes@yahoo.com</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Dever Masters <a href="mailto:devermestacano@gmail.com">devermestacano@gmail.com</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Emma Hembree <a href="mailto:em.hembree@gmail.com">em.hembree@gmail.com</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Holly Plotts <a href="mailto:hplotts@gmail.com">hplotts@gmail.com</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Josie McRaimolds <a href="mailto:josiemcraimolds@gmail.com">josiemcraimolds@gmail.com</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Karinne Cobb <a href="mailto:krcobb654@gmail.com">krcobb654@gmail.com</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Katherine Bolton <a href="mailto:kbolton@comcast.net">kbolton@comcast.net</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Lauren Hickling <a href="mailto:hicklingl@comcast.net">hicklingl@comcast.net</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Leslie Allen <a href="mailto:leslie@allenuideosearch.com">leslie@allenuideosearch.com</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Lily Anderson <a href="mailto:lilanderson@comcast.net">lilanderson@comcast.net</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Olivia Unger <a href="mailto:oliviaunger@comcast.net">oliviaunger@comcast.net</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Sarah Laser <a href="mailto:sarahlaser@gmail.com">sarahlaser@gmail.com</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Select Date from Drop Down**

**Select All or Select Individuals**

**Click SAVE**

If your group did not meet, choose **no** and enter a note explaining why you didn't meet. Don't forget to click **Save attendance**.



Banks, Sarah; Anderson, Emily

Post attendance for group meeting on...  
-- please select --

Did this group meet?  
 yes  no [Back](#)

Why didn't your group meet? \*

[Save attendance](#) [Cancel](#)

## Subsection

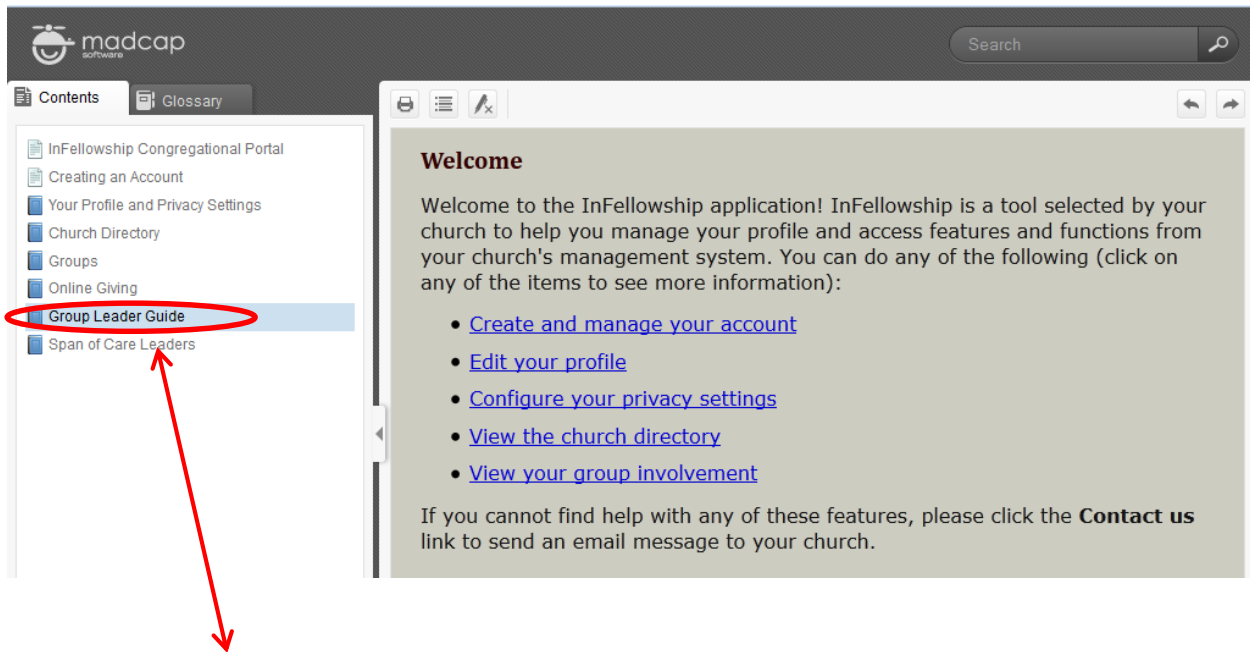
### Online InFellowship Help

To access online help, login to your InFellowship account. On the home screen, the help feature is located in the top right corner.

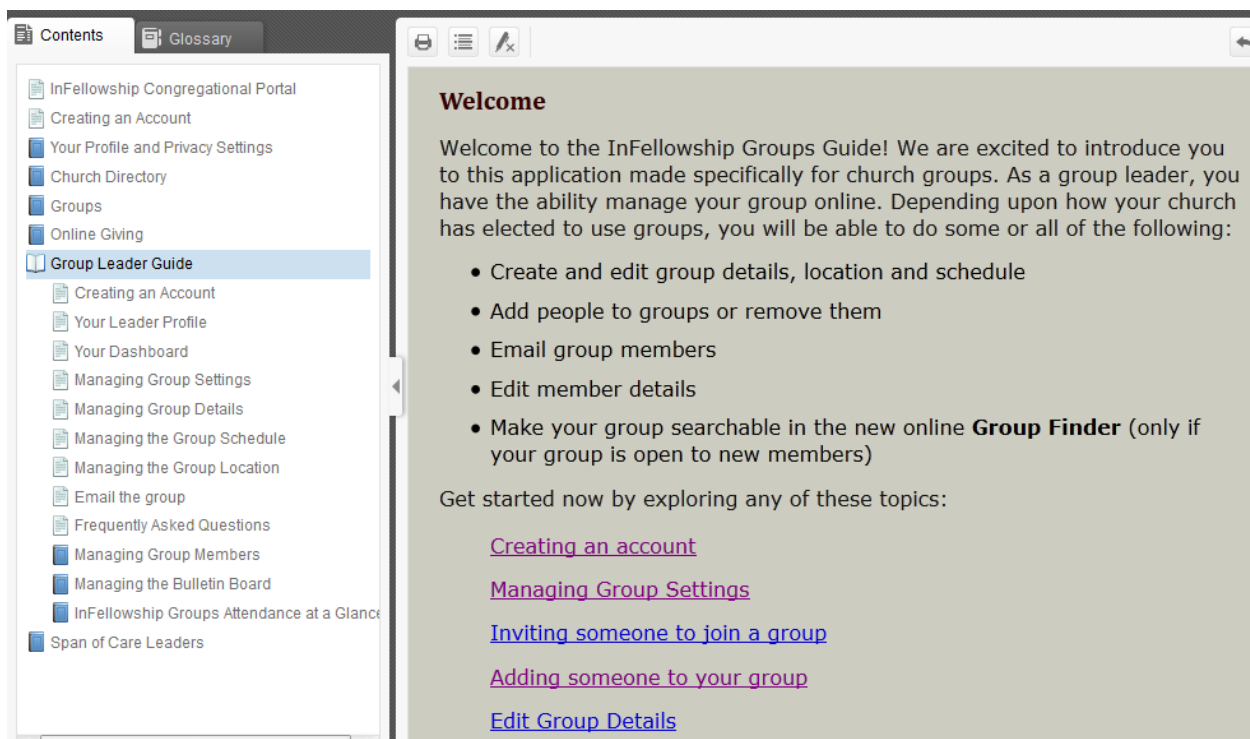


Clicking this will open a new window.

[Help screen home](#)



On the left side of the screen, click Group Leader Guide.



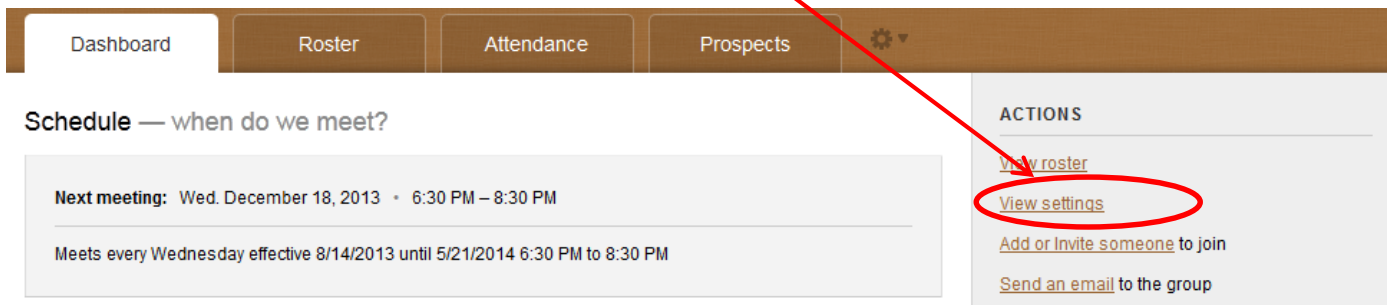
## Accessing your Group Settings and Roster

### [Managing Your Group Settings](#)

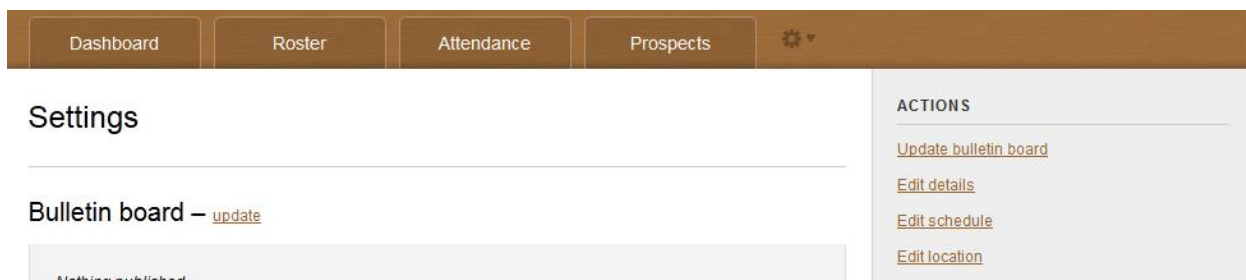
Once logged in, you will be directed to the Welcome page to view a list of groups you are associated with. Clicking the group name will navigate you to the group *Roster* and *Dashboard* where you can manage group **Settings**.

The groups you lead will appear in the section *You lead*. Any group to which you are a member will appear in the *You belong to...* section. If you do not see the group you lead on the Welcome home page, please notify your church leaders. If you have been given oversight as a coach or mentor to other group leaders, you will see a special section called *Your spans of care...*

Click on the group you lead to display your group *Roster* page. The group settings can be accessed by clicking *Settings* on the right side of the page.



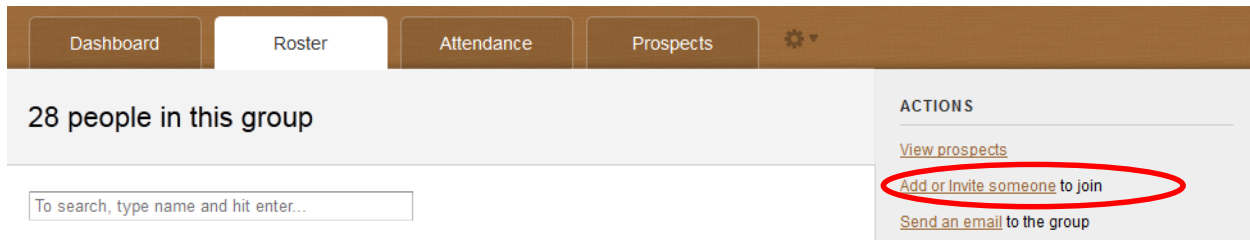
Clicking on "settings" will allow you to Update your bulletin board, edit details of the group, edit the group schedule, and edit the location of your group meeting.



## Add New Member to Group

### [Adding a new member](#)

To add a new group member, log in to inFellowship, toggle to the Group you want to work with and click **Add or Invite someone**, which is a link on the Dashboard tab or the Roster tab.



The screenshot shows a navigation bar with tabs for Dashboard, Roster, Attendance, and Prospects. Below the tabs, it indicates '28 people in this group' and provides a search input field. To the right, an 'ACTIONS' menu is visible, containing links for 'View prospects', 'Add or Invite someone to join' (circled in red), and 'Send an email to the group'.

Next, use the search feature to find the person you want to add to the group.

**Tip!** Type in the full name of person you want to find. The system is looking for an exact match. For example, if you search for Jane Do, the system will not find Jane Doe.



The interface is divided into two main sections: 'Search' and 'Select'. The 'Search' section prompts the user to 'Provide information about the person you'd like to add/invite'. The 'Select' section prompts the user to 'Select the correct match and confirm the add/invite'.

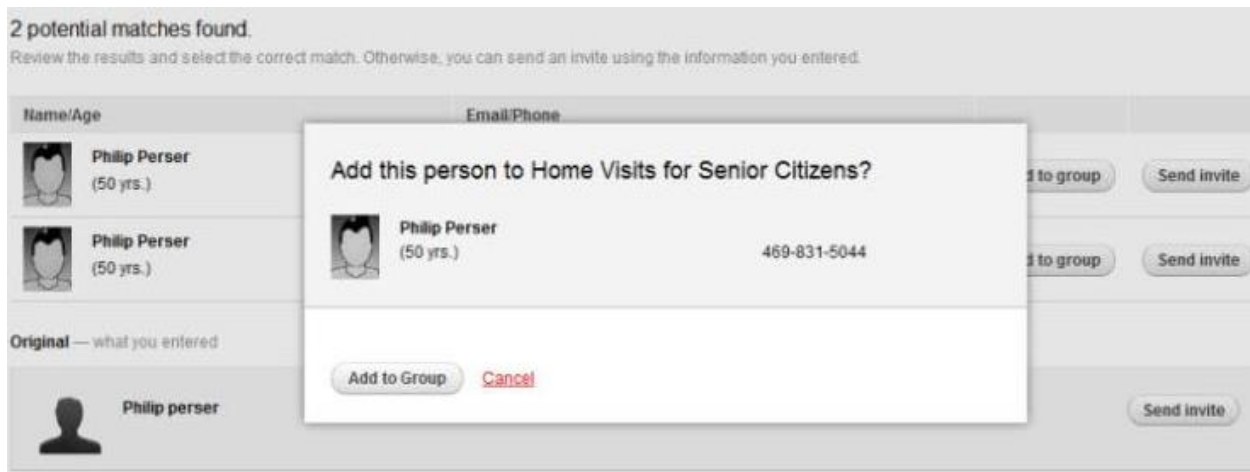
**Name (required)**

First  Last

Email  Phone

You may be presented with more than one potential match.

Select the person you wish to add and then choose **Add to Group**. When you select **Add to Group**, a confirmation modal will be displayed. You can choose **Add to Group** or **Cancel**.



**Note:** If no potential matches are found, you will only have the option to Send an Invitation to the person. The individual's email address is required in order to send it.

After filling out the fields, click **Send Invite** and an email invitation is sent to the potential group member. It's now up to the person you invited to accept or decline the invitation.

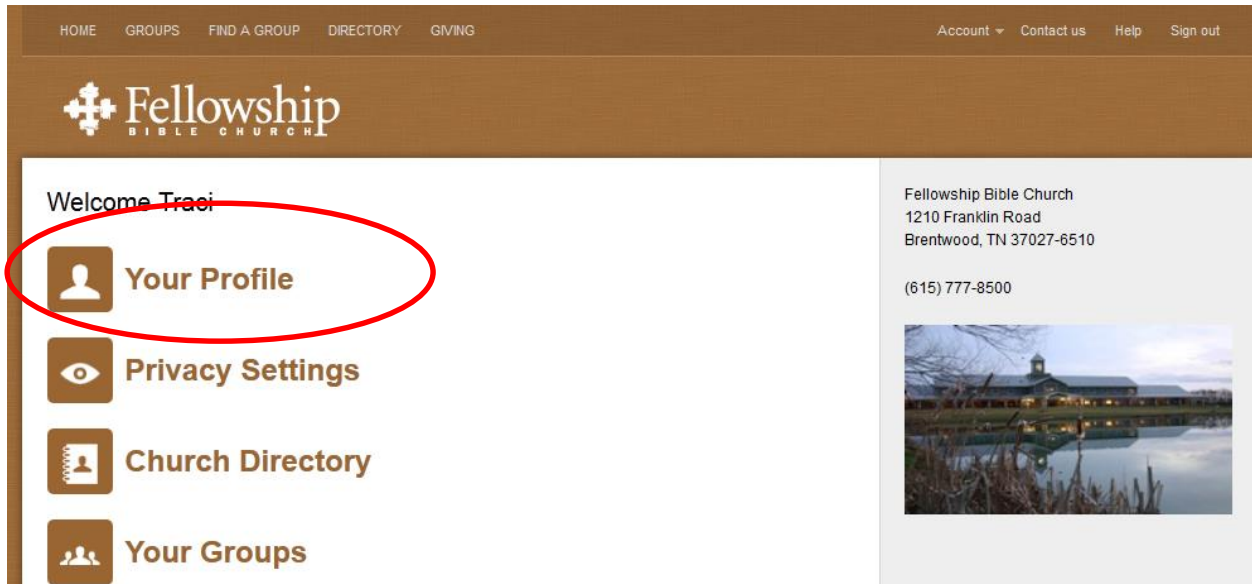
## Your Leader Profile

Your leader profile will display to any user who looks for more information about your group. Include a picture of yourself (just like on Facebook or any other social network) and a bit of information about yourself. You may also want to include a sentence or two about your vision for the group and why you got involved in leading a group.

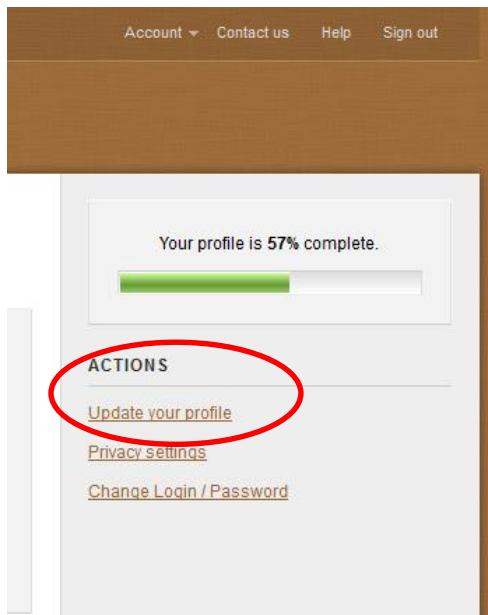
To edit your profile:

1. Do one of the following:
  - Click **Account** and select your name from the list of options
  - or
  - Click **Home** and **Your Profile**





1. Click **Update your profile** in the list of available actions on the right side of your screen. Your profile will now be editable.



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2. Edit or complete any profile fields.
  3. Click **Save changes**.

## Your Profile - Completeness

When you view or edit your profile, you may notice a progress bar that displays the percentage complete for your profile. The more information you complete, the higher your percentage rate!

