



CONTACTS AND NOTES FOR PASTORS

Return on Ministry

Learn the value of Contacts and Individual Notes in Fellowship One. See how shared and private Note Types allow better communication between a church and its people. Use contacts to keep track of people who you minister to.

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CONTACTS AND NOTES FOR PASTORS

Return on Ministry

The purpose of this training guide is to inform Pastors about the value of using contacts and notes within Fellowship One. This training guide will walk you through the process of using contacts and notes to record information about people within your church. At the end of this class you will know how to locate contacts, record new contacts, locate notes, record notes and report on both.

CONTACTS

- What is a contact
- What are contact items
- Where are my contacts

NOTES

- What is a note type
- Where are notes in Fellowship One
- Add Note
- Manage Notes
- Share Notes
- Individual vs. Household notes

REPORTS

- Show me my contacts
- Show me my notes

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What is a contact?

A contact in Fellowship One is when a person in your congregation reaches out to the church for a need. There is a difference between the contact and the contact item in Fellowship One.

Examples of contacts:

- Connection Card from Worship Service
- Phone calls to church office
- Walk-ins to church office

What is a contact Item?

The contact item refers to explicit tasks that you will be involved with in connection to the contact made by individuals. These items represent tasks that you are to follow up with in relation to the contact.

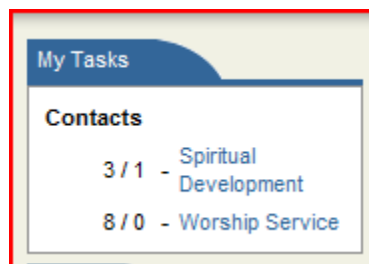
Examples of contact items:

- Requests for information about a ministry
- Request to speak to a pastor
- Request to sign up for a class

Where are my contacts?

To see contacts assigned to you in Fellowship One you need to look no further than your home page.

Located at the top right corner of the screen you will see all your open and in progress contacts. They are sorted by ministry name. The left side number is how many new contacts for that ministry and the right side number is how many in progress contacts for that ministry.



How did my contact get there?

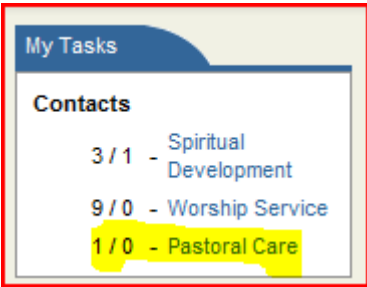
For each contact item defined in Fellowship One, we can assign an individual Fellowship One user to respond to that task.

Below is an example of how your user account is connected with a contact item.

	Name	Type	Ministry	Route To	Multi-Close	Disposition	Active
[Edit] [Delete]	Aerobics	Interest	Sports	Tara Coulson	✓		✓
[Edit] [Delete]	Change in membership status	Interest	Worship Service	Tara Coulson			✓
[Edit] [Delete]	Change of address	Interest	Worship Service	Tara Coulson	✓		✓
[Edit] [Delete]	First-time visitor	Interest	Worship Service	Jeremy Jackson	✓		✓
[Edit] [Delete]	Friday Night Bible Study	Interest	Spiritual Development	Tara Coulson	✓		✓
[Edit] [Delete]	I need a mentor (Women's)	Interest	Womens	Tara Coulson			✓
[Edit] [Delete]	I want to be a volunteer	Interest	Children	Jeremy Jackson	✓		✓
[Edit] [Delete]	I want to be Baptized	Interest	Baptism	Tara Coulson			✓
[Edit] [Delete]	I would like to join the church	Interest	Worship Service	Tara Coulson			✓
[Edit] [Delete]	I would like to know more about Singles	Interest	Singles	Tara Coulson			✓
[Edit] [Delete]	New Testament Heros	Interest	Spiritual Development	Tara Coulson	✓		✓

When someone completes your connection card in the worship service and checks the boxes on that card Fellowship One can take those same items and convert them into task for Fellowship One users.

Once you have received a contact on your home page it is time to follow up.



Let's step through the process:

1. Click the link for the ministry you want to work with. This will redirect you to your contact list as shown below. You now see who the contact is and what contact item was selected

Contact List								
Status:	Open	Item:	All Items	Assigned To:	Jackson, Jeremy	[Search]		
Select:	All, None	1 - 1 out of 1 (sorted by Open Date asc)						
	Assigned User	Assigned RLC	Attributed To	[View Details]	Item	Open Date	Last Update	Status
<input type="checkbox"/>	[Manage] Jeremy Jackson		Tara Coulson		I would like to talk with a Pastor	10:13 AM		Open
Select an Action...								

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2. Click on the **Manage** link to work the contact. Now we see all information related to this contact

The screenshot shows a web-based contact management interface. At the top, there are tabs for 'Contacts', 'Basic', and 'Communication'. The contact name 'Tara Coulson' is displayed on the left, and the phone number '972-555-1212 (Home Phone)' is on the right. Below this, there is a message: 'I would like to talk with a Pastor (Request) Assigned To: Jeremy Jackson Worship Services 11/6/2005 11:15 AM'. A note follows: 'recently moved to the area. Looking for a new church home request a conversation with a Pastor'. The form includes several fields: 'Individual/Household' (dropdown menu with 'Tara Coulson' selected), 'Contact Method' (dropdown menu with 'Phone' selected), 'Contact Note' (text area), 'Confidential Note' (text area), 'Share Notes With' (checkboxes for 'First-time visitor', 'I would like to join the church', and 'I would like to talk with a Pastor', with the last one checked), and 'Transfer' (two dropdown menus). At the bottom right, there are 'Close', 'Submit', and 'Cancel' buttons.

3. You can call the contact and discuss the contact item. Notice the Home Phone number is listed at the top of the contact. If you want to view additional ways to contact the individual, click on the **Communication** tab at the top of the contact information.
4. Record any and all pertinent information into the contact notes section. You can also choose to record sensitive information in the *Confidential Note* field. Anyone who is authorized to work contacts can enter information into *Confidential Note*, however, only those user's who have the *Confidential Contact* security access right may read them.
5. Select other contact items to share your notes from the available check boxes in the **Share Notes With** field. This will allow you to update all other ministry leaders' contact items with your notes. This option is really cool because it allows other leaders to communicate in a personal way that seems to the individual as if all staff members are communicating only about her. For example, "I know Pastor Bill called you on Monday, but I just wanted to follow up with a personal call to invite you to our women's event next Sunday."
6. If you are done with the call but you are not done with the contact just click **Submit**.

Next time you open the same contact you will see your notes as part of the contact display.

The screenshot shows a contact record for Tara Coulson. At the top, there are tabs for 'Contacts', 'Basic', and 'Communication'. The contact name is 'Tara Coulson' and the phone number is '972-555-1212 (Home Phone)'. The status is 'In Progress'. There are two notes: 'I would like to talk with a Pastor (Request) Assigned To: Jeremy Jackson Worship Services 11/6/2005 11:15 AM' and 'recently moved to the area. Looking for a new church home request a conversation with a Pastor'. Below the notes, there is a section for 'Share Notes With' with three checkboxes: 'First-time visitor', 'I would like to join the church', and 'I would like to talk with a Pastor' (which is checked). There is also a 'Transfer' dropdown menu. At the bottom right, there are 'Close', 'Submit', and 'Cancel' buttons.

- 7. Once complete with the contact you type your final note and select the **Close** check box and click **Submit**.

The contact entry remains with the individual’s record for future reference. As shown below, the Contacts tab in the individual’s record allows you to find contacts by date range.

The screenshot shows the 'Contacts' tab in the individual's record. It has a search bar with 'Attributed To' set to 'Tara Coulson', 'Date Range' from '12/19/2007' to '3/19/2008', and 'Status' set to 'All'. Below the search bar is a table with the following data:

	Attributed To	Item	Service Time	Status	Opened	Modified
[Manage]	Tara Coulson	First-time visitor	Worship Services 11/6/2005	Open	3/19/2008	
[Manage]	Tara Coulson	I would like to join the church	Worship Services 11/6/2005	Open	3/19/2008	
[Manage]	Tara Coulson	I would like to talk with a Pastor	Worship Services 11/6/2005	Closed	3/19/2008	3/19/2008

This view shows all contact items recorded for this contact. When you are viewing a person’s contact history you can see if there are open or closed items. The **Manage** link is visible if you have rights to the ministry that is connected to the contact item.

What is a Note Type?

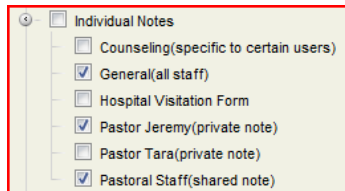
A note type helps you organize notes about individuals in Fellowship One. The difference between a contact item and a note is that the contact item requires action whereas the note is something that is nice to know but does not require follow-up.

The cool feature about note types is that each type that is added to Fellowship One becomes a security access right. This allows you to granularly grant access to note types based on the user account.

Some examples of note types are as follows:

- Counseling—private note type available to specific Fellowship One users.
- General—available to every Fellowship One user.
- Hospital Visitation—available to specific users.
- Pastor Jeremy—private to specific user.
- Pastoral Staff—shared among all pastoral staff users.

Some note types will be shared by multiple users of Fellowship One and others are specific to a single user account. Each user can have different note types assigned by security rights. As shown in the image below each type can be selected individually.




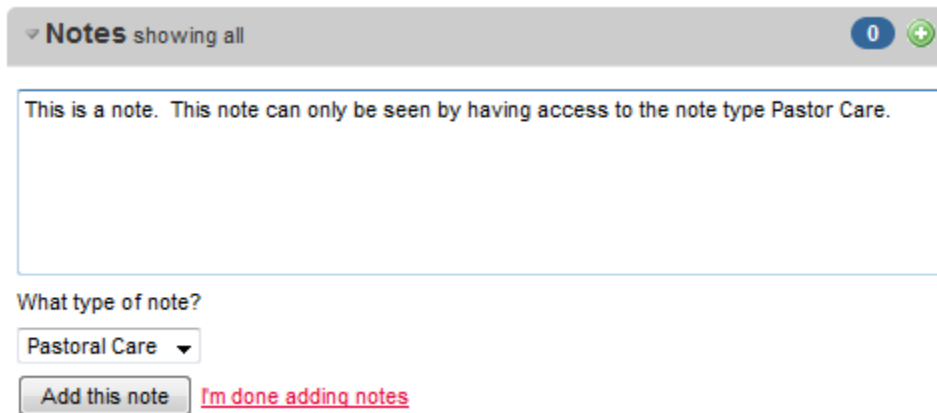
Where are notes found in Fellowship One?


You see individual notes when you edit an individual record. Search for a name in the **People Search** field in the upper left corner of Fellowship. Type a name or partial name and press Enter. Search results display in the middle of the screen. Click the person's name. You can see the notes for that person as shown below.



Add Note

To add a new note to a person's record click on the  on the notes menu bar as seen below.



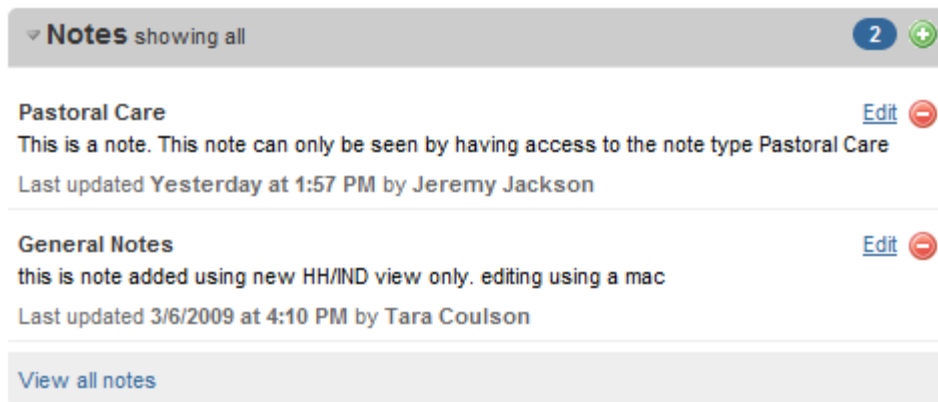
▼ **Notes** showing all 0 


This is a note. This note can only be seen by having access to the note type Pastoral Care.


What type of note?
Pastoral Care ▼


[I'm done adding notes](#)

To see notes about this person look at **Notes** menu as seen below.



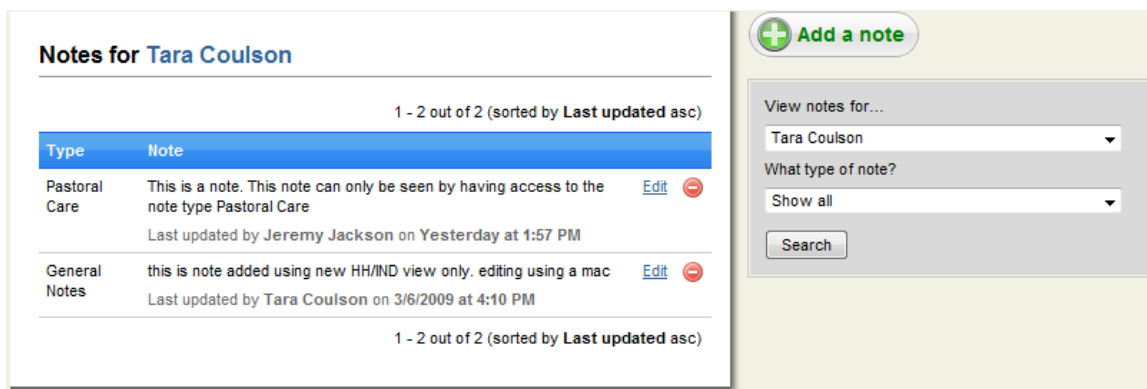
▼ **Notes** showing all 2 

Pastoral Care [Edit](#) 
This is a note. This note can only be seen by having access to the note type Pastoral Care
Last updated Yesterday at 1:57 PM by Jeremy Jackson

General Notes [Edit](#) 
this is note added using new HH/IND view only. editing using a mac
Last updated 3/6/2009 at 4:10 PM by Tara Coulson



[View all notes](#)

To see all notes you can click the View all notes link




Notes for Tara Coulson

1 - 2 out of 2 (sorted by Last updated asc)

Type	Note	
Pastoral Care	This is a note. This note can only be seen by having access to the note type Pastoral Care Last updated by Jeremy Jackson on Yesterday at 1:57 PM	Edit 
General Notes	this is note added using new HH/IND view only. editing using a mac Last updated by Tara Coulson on 3/6/2009 at 4:10 PM	Edit 

1 - 2 out of 2 (sorted by Last updated asc)

 **Add a note**

View notes for...
Tara Coulson ▼

What type of note?
Show all ▼

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Share Notes

To share notes you need to use a note type that others on staff have access to.

Notes showing all 2 +

Note

What type of note?

General Notes
General Notes
Jeremy' Notes (private)
Pastoral Care (shared by pastors)

In this case the **Pastoral Staff** note type is shared among more than one user of Fellowship One. Sharing notes ensures everyone has access to the same information.

Reports

A good report to look at is the M4037- Contact Item Follow-up Worksheet. This report combines both the contact item notes and individual notes onto the same report.

Example of the M4037 report.

Pastor Bill		William Wheaton	4/1/2009
Original Notes	this is a contact note this is a note specific to Pastor Bill		
Date	Name	Contact Item	Author

Notes		
Name	Type	Date
Tara Coulson	Pastoral Care (shared by pastors)	3/31/2009
This is a note. This note can only be seen by having access to the note type Pastoral Care		

The P8000 – Individual Notes by Note Type and Date Range report will show you all notes you have permission to see over a date range.

Example of the P8000 report.

Jeff and Tara Coulson

123 main
irving, TX

972-555-8871
tcoulson@fellowshiptech.
com



Coulson, Tara

Member

Entered By	Note Type	Note Date	Note
Jeremy Jackson	General Notes	3/6/2009	this is note added using new HH/IND view only. editing using a mac
Jeremy Jackson	Pastoral Care (shared by pastors)	3/31/2009	This is a note. This note can only be seen by having access to the note type Pastoral Care