

Administrator

Phase 2 implementation.

This can either be done immediately after phase 1, or at a later date. However we would advise that the Church has all of their people data in the system before this.

CUSTOM FIELDS

<https://support.iknowchurch.co.uk/modules/settings/custom-fields/>

- From the Settings Module, select Custom Fields.
- Create a Custom Field for secondary contact details. Make this accessible in 'Me' and make it 'Live'.
- Make this visible to the relevant admin groups.
- Add the fields for mobile phone, secondary email address. and any other relevant details you may need.
- See how this is displayed within a person's profile.
- Repeat this for any other custom data you may need for now (such as medical info).

SETTINGS

<https://support.iknowchurch.co.uk/modules/settings>

- Create a Circle for 'Key Holders' add everyone who has a key for the Church to this.
- Create a second Circle for all of your key leaders involved in your sunday gatherings.
- Create a new Process for new visitors to the Church. Add in your normal follow up stages and assign them to the appropriate people.
- Create a Process with a manual trigger.
- Create a manually triggered process, but don't assign the first stage to anyone (either leave the field blank, or select 'Set as Manual'. Trigger this process in a person's profile and select an individual to be responsible for this instance of the Process.
- Ensure you've got the correct email addresses assigned for the needs in email manager. Add any necessary additions.

ROOM BOOKING

<https://support.iknowchurch.co.uk/events/adding-events>

- If you have rooms which you hire out, set these up for Room Bookings (its advised that you start with Assets and then preferences before building the room).
- Set the Church up as a 'client'.
- From the Room Bookings module, book your main hall for your Sunday gatherings
- Set up a provisional midweek booking for a business meeting which requires 5 tables, a projector and a flip chart.

SERVICE PLANNER

<https://support.iknowchurch.co.uk/the-service-planner>

- Create a run sheet for your Sunday gathering.
- Save this as a PDF and send it out to all the relevant teams.

EVENTS

<https://support.iknowchurch.co.uk/adding-events>

- If it's not already, there create an event in the calendar for your regular Sunday gatherings.
- Send an invite to the key leaders to see who will be present at the weekend.

