

Managing a Home Group

The church database allows members to manage their own details and also to have control over any groups which they may be leading.

As a Home Group Coordinator, you are able to manage your Home Group on the system. The things you can do are:

1. Add someone to your group.
2. Delete someone from your group.
3. Email the whole group or one or more people in the group.
4. Print a group list.

Select 'ADMIN > Group Manager'. You will see a selection of groups in the left-hand panel, depending on what roles you have in the church. One of them will be your Home Group.

Click on a group name to expand it. Under your Home Group you should see: Coordinators, Hosts, Leaders and Members. If you click on 'Members' you should see a list of all the people in your group.

To add someone to the group:

1. Click on the button marked 'Add new member'.
2. A lookup box appears. Type into the box part or all of the person's name and click OK.
3. One of three things will happen:
 - i. You will get a 'Person not found' message. This either means that you have typed the name in wrong or that the person you want to add is not on the system. Try again with perhaps a shorter version of the name (you can use just a first name or just a surname). If you don't think the person is on the system, email the church office or the Church Secretary asking them to add them. You'll need to include a few details.
 - ii. You will get a list of people whose names correspond to what you typed in. Choose the appropriate one. If they're not in the list, again either you have mistyped the name or they're not on the system. See above.
 - iii. If the name you have typed in is unique, that person will automatically be added to the group. No message will appear. Check the list to make sure it's the person you wanted.

To delete someone from the group:

1. Use the 'remove' link on the right of the person's entry in the list.
2. You'll get a message asking you to confirm. Click OK.

To email the whole group:

1. Hit the 'Quick Report' button.
2. Select 'Send Email'.
3. A blank email document will appear. In the body there may be a note telling you that certain people in the group don't have registered email addresses. This is to remind you to contact those people by some other means. Delete the text from the body.
4. The BCC box will have a long string of characters. Don't worry about this – it is a temporary email address just used this once.

5. Complete the 'Subject' box and the body with the subject and message you want to send respectively.
6. Send as normal.

To email one or more people:

1. In the list, click on the people you want to send to.
2. Then proceed as above.

To print a group list:

1. Use the 'Quick Report' button.
2. There are a number of possible list formats here. You are welcome to try any of them, but the one you are most likely to find helpful is 'sbc_address_list'.
3. This will download a document in the ODT format, which can normally be opened by Word.

NB: Please note that for various reasons you will be in the 'Coordinators' rather than the 'Leaders' list. The 'Leaders' list is not used at present for Home Groups, although it is used for other groups (e.g. Sunday Club groups).