Icon Systems
Church Management Software

Membership Setup Guide

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Publisher

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Quick Startup Guide

When starting with IconCMO, there are two ways to get your membership information into the system.

One is to import your data from another system or existing spreadsheets. We do data conversions for a reasonable fee to import data from other systems. Also, sometimes churches are able to do their own data imports using our API.

The other approach is to enter your records manually. You can read in the 'How To…' section of this guide about how to create a household and add individuals to it.

Once your household information is set, you can organize individuals into groups, associate them with certain 'talents', and set up events for attendance, all of which is described below. Also, you can assign donor numbers to your people and set up the Donations module, as described in our Donations setup guide.

IconCMO Software Concepts and Definitions.

Households and Individuals

Understanding the difference between a Household and an Individual is important and is defined as follows:

- o Definition of a **Household**: A Household is a physical location where people reside and the name of the household represents the adults that are responsible for the location. It **does NOT** represent an individual. All individuals are listed within the household. Additionally, the household record defines the main mailing address, alternate address, main email and phone (if one exists), status, email history and directory inclusion options. There is very little individual information displayed on the household screen.

- o Definition of an **Individual**: An individual is a person that resides at the household location. Every member (individual) of a family or household should have an individual record in the system. The individual record is where everything about that person is stored – birthdays, marriage dates, personal emails, phone numbers, gender, relationship, what groups and talents they belong to, work information, etc.

- o A **Household** example – Let's say Jimmy and Mary Jones have three kids: Sarah, John, and Marky. We would have **one** household record called 'Jimmy and Mary Jones' that includes the household's address. Then we would have **five** individual records. The first individual record would be Jimmy Jones, the second individual record would be Mary Jones, the third individual record would be Sarah Jones, the fourth individual record would be John Jones, and the last would be Marky Jones.

How does this affect the data input or use of the system?

- **Example Scenario** – The church wants to send a personal mailed invite (or email) to the teenagers about an upcoming event at the church. The church wants the labels addressed only to the teenagers, not the parents. This is a case where the individuals' records are used instead of the household for labels, because the household is named after the parents. IconCMO will pull the teenagers' names from their individual records and use the physical address from the household record to create the label.

What is a Group?

Groups are used to divide members into smaller categories to send communications, or track a specific group's attendance. IconCMO has two types of groups, Household Groups and Individual Groups.

As of January 2022 household groups are a legacy feature. You will NOT be able to add any new household groups, but will be able to access any *existing* household groups in your account. All functionality from household groups is available in individual groups.

A deeper understanding of the differences between a Household Group and an Individual Group is as follows:

- Definition of a **Household Group**: A Household Group is where the user creates groups and assigns a Household to the group. They first create the group, and then can add or remove households as they see fit. Keep in mind that a household is a physical location where people reside, and the name of the household represents the adults that are responsible for that location. Therefore, the labels will have the household name printed on them.

- Definition of an **Individual Group**: An Individual Group is created for the purpose of tracking attendance of individuals in a small group or ministry that meets regularly. It's also used for communication to these individuals. With individual groups you can send communications to specific individuals, or the entire household.

Note about Emails – When households or individuals have the same email address listed under several individual records, or a household's email is the same as one of the individuals, the system will only send the email once. It will not send duplicates to the same email address.

Difference between Groups and Talents

Understanding the difference between Groups and Talents is important and is defined as follows:

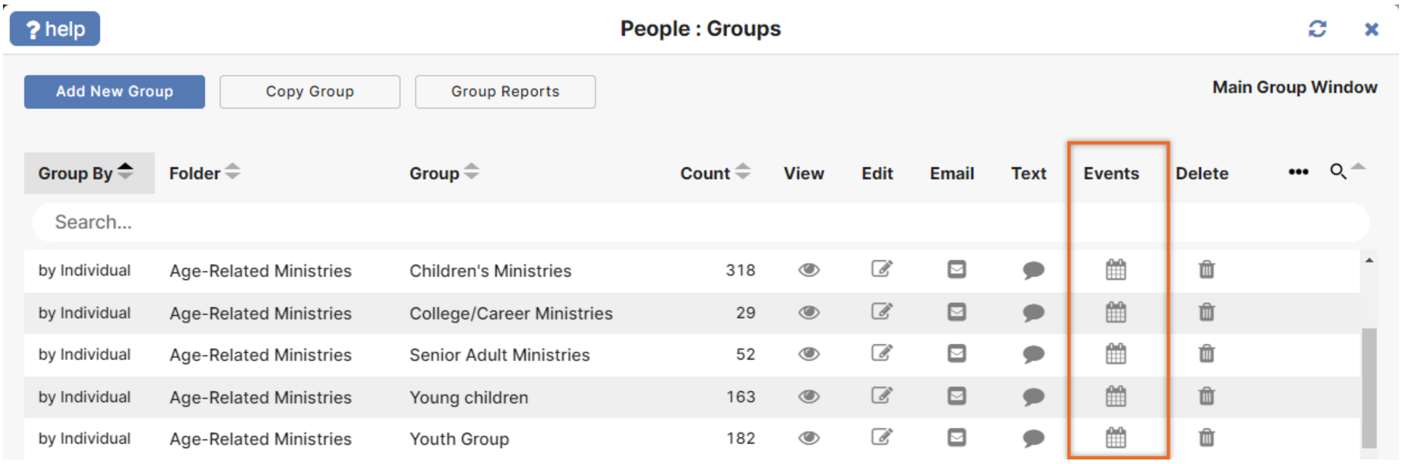
- Talents are assigned at the individual level. Households do not have talents. Some common talent examples are greeters, plumbers, carpenters, ushers, book store attendants, etc. Notice how these describe a gift of someone – not that they belong to a group such as 'Men's Bible Study' or '5th Grade Bible School'. Think of talents as individual gifts that a person is willing to use on behalf of the church in order to further its mission. An example: the mother in a household could have a talent as an usher. Taking this a step further, the mother could be part of the '8:30 Women's Bible Study' group, plus she also helps as an usher. Other ladies could be part of the

'8:30 Women's Bible Study' but not be involved as an usher. They might, however, help out as a plumber or book store attendant if they are experts in those areas.

Difference between Group Events And Attendance

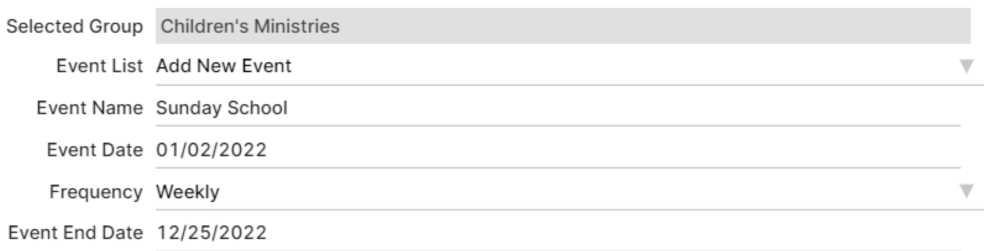
Understanding the difference between Group Events and Attendance:

- o Group Events are designed for taking attendance of a specific group of individuals (not household groups.) This is completed under People → Groups. Choose your group and Click the 'Events' Icon.



Note: If the Events Icon is not visible on the screen, you will need to choose to display that column by clicking on the ••• icon in the upper right. Then ensure the 'Events' column is checked.

- o You will need to add the event first, to track attendance within the group. This is done by clicking the 'Events' icon for the appropriate group and choosing 'Add New Event' from the Event List drop-down. Then you can give the event a name and choose a date. If the event is recurring you can choose the frequency and end date. If it is not recurring, choose 'Do Not Repeat.'



The biggest difference is that when you set up events you will only have the people in that group to take attendance from, instead of the entire congregation.

- o Attendance is for tracking participation of the entire congregation, typically for the weekly services. This is completed under People → Attendance. Attendance can be taken by individual names, a general head count, or both. To start, folders and dates must first be set up. The top of the window allows you to add folders and setup time tracking if desired.

Add New Folder | Copy Attendance | Move Attendance | Attendance Reports

Folder List

Year	Folder	Track Times	Slot 1	Slot 2	Slot 3	Delete
2023	Sunday Service	Yes	9 am	11am		
2022	Church Preschool	Yes	10	11	4pm	

Recording Attendance: Once you have folders set up and dates added, go to the bottom of the window to record who attended.

2023-Sunday Service | Add Date

Attendance Dates For Folder

Date	Description	9 am	11am	HC 9 am	HC 11am	View	Delete
01/02/2022	Sunday Service-Guest Speaker	0	0	56	100		
01/09/2022	Sunday Service	38	0	65	51		
01/16/2022	Sunday Service	0	0	0	0		
01/23/2022	Sunday Service	0	1196	0	0		

The number shown in blue is the total number of individuals who were marked as having attended that event. If attendance has not been recorded, this number would be zero. Clicking on this number under the appropriate time slot for any date will populate the individuals list for you to mark who has attended. Click the checkbox under the correct time(s) for each individual who has attended. You can switch it back to unattended by removing the check from the box. Your selections save automatically.

Edit Attendance

Folder: Sunday Service

Attendance Date: Sunday Service 05/08/2022

Add All | Remove All

9 am	11am	Last Name	First Name	Status
☐	☑	Abar	Anjeneya	Active
☐	☑	Abramovic	Tychicia	Active
☐	☐	Addler	Ashley	Active
☑	☐	Addler	Cyd	Active
☑	☐	Addler	David	Active
☑	☐	Addler	Murrae	Active NonMbr
☑	☐	Addler	Sarah	Active
☐	☐	Addler	Tyson	Active
☐	☑	Ages	Shannon	Active
☐	☑	Ages	Steven	Active
☐	☑	Agler	Diane	Prospect
4	5	Attended	Displayed: 1144	

Close

A running total of the number of individuals you have marked as attended will be visible at the bottom of the screen under the column for each time.

Head count attendance is entered by clicking on the number under the Head Count column (abbreviated with HC.) Type the number you want to enter and it will automatically save.

System Overview

System Settings Overview

o **Organization→ Preferences→ Church Membership**

This window has several sections – System Default Values, Modify Contents of a Drop Down List, Other Membership Preferences, and Add Signature to Donation Statement Style Receipt.

System Default Values

o Allows you to set the default values for denomination, ethnic origin, language, address label format, city, state, zip code, area code, relationship and gender, as well as create two custom fields for household records, and choose whether or not to automatically include new households in the directory. Remember to click 'save defaults' once all changes are made.

Modify Contents of a Drop Down List

o Allows additional values to be added or deleted from the standard drop-down list. For example, you can add 'Shut-In' to the 'Status' drop-down list to be used for individual and household status. Other drop-down lists you can add values to include Relationship, Denomination, Language, Countries, Ethnic Origin, Occupation, Gender, Note Type and both User Defined fields (created in the System Default Values section.)

- Maintaining or Modifying Drop Down List Contents:

- Adding a new entry
  1. Select the drop-down list you want to change from the 'Select drop-down list' field.
  2. The ‘Current name’ field should default to 'Add New Entry'.
  3. Enter the new entry in the text field 'New / Modified Value'.
  4. When finished, press the 'Save New' button.
- Change an existing entry
  1. Select the drop-down list you want to change from the 'Select drop-down list' field.
  2. Select the entry to change from the 'Current name' drop down list.
  3. Enter the new name in the text field 'New / Modified Value'.
  4. Press the button 'Modify Dropdown'. This will change the old name to the new value, unless the new value also exists in the drop-down list.
  5. When a new modified value already exists, any individuals that had the old name will be changed to the new modified value and the old name will be deleted.
- Delete an existing entry
  1. Select the drop down list you want to change from the 'Select Drop Down List' field.
  2. Select the entry to be deleted from the 'Current name' field, then enter a replacement value in the edit box titled 'New/Modified Value'.

3. Press the button 'Delete Dropdown'.
4. When an individual record has a value matching that to be deleted, the deleted entry will be replaced with the New/Modified value.
5. The replacement value entered must exist in the drop-down list you're working with.

Other Membership Preferences

o Allows changes to the phone and email types as well as special events. Phone and email types such as 'mobile' or 'work' can be added. Special events are milestone dates like birthdays, marriages, confirmation or joined dates. Each button launches a sub-screen as noted below. These settings should be set up by the church's system administrator as they affect the entire system.

- Maintaining Special Events:

▪ Add a new event
    1. Press the 'Clear Fields' button to clear out the contents of all the fields
    2. Enter the name of the new event in the 'Name' field. The event name can contain a maximum of 25 characters.
    3. Add up to 6 additional fields to retain information about the event that you want your users to enter.
    4. Give each field a name by typing the field name in the edit field.
    5. Press the 'Save' button to add the new event to the system.

▪ Change an existing event
    1. Select the event to change from the list of events on the left.
    2. Modify the name of the event, or the names of the 6 user-defined fields.
    3. Press the 'Save' button after completing the changes.

▪ Delete an existing event
    1. Select an event to be removed from the list of events on the left.
    2. Press the 'Delete' button. A message will appear reminding you that the event will also be removed from any individuals to which it has been assigned.
    3. Press 'Ok' to delete.

Note: The first five event names are used by the system and cannot be modified or removed.

- Maintaining Phone Types:

▪ Adding a new phone
    1. Press the 'Clear' button to clear out any existing information.
    2. Enter the name of the phone category you want to create.
    3. Check the 'Use Ext' checkbox if the phone type contains an extension.
    4. Check the 'Cell Phone' checkbox if this phone type is for cell phones. This cell phone checkbox is used to identify if a phone number should have the capability to be sent text messages. This can be useful for alerting entire groups of schedule changes etc.
    5. Press the 'Save' button after making your changes.

▪ Changing a phone
    1. Select a phone name from the list of phone types.
    2. Change the values.
    3. Press the 'Save' button.

- Deleting a phone name
    1. Select a phone name from the phone list.
    2. Press the 'Delete' button. A message will appear reminding you that this phone assignment will be removed from any household or individual using it.
    3. You then have the chance to cancel or continue the request.

- Maintaining Email Types:

- Adding, changing and removing email names – These options work the same as the phone options, without any extra checkboxes.

o **Organization→ Preferences→ Personal**

This screen has several sections: System Wide Preferences, Membership & Donation Preferences, Accounting Preferences, Personal Security, User Email, and Other Personal Preferences.

Note: This screen affects <u>only</u> the logged in user and not other users on the system.

System Wide Preferences

o A user can set the fiscal year they want to work in, the date format, background image displayed in the system and switch the accounting menu sections on or off depending on whether or not they wish to see them displayed in the main menu of IconCMO.

Membership & Donation Preferences

o A user can set the default status code and country for data entry purposes.

Accounting Preferences

o Allows the user to set a default date and fund for the accounting side of the system (ie. General Ledger, Banking, AR, AP, Payroll).

Personal Security

o Allows the user to change their current password. The user must know their current password to proceed. If they don't know their current password, they would need to use the 'Forgot My Password' feature on the login screen.

User Email

o Allows the user to change their current password or email. It is **<u>very important</u>** for each user to have their current email address stored in the system in case they ever need to reset their password. Icon Systems' employees do not have access to any passwords or the ability to change email addresses for users. Password resets are sent via email.

Other Personal Preferences

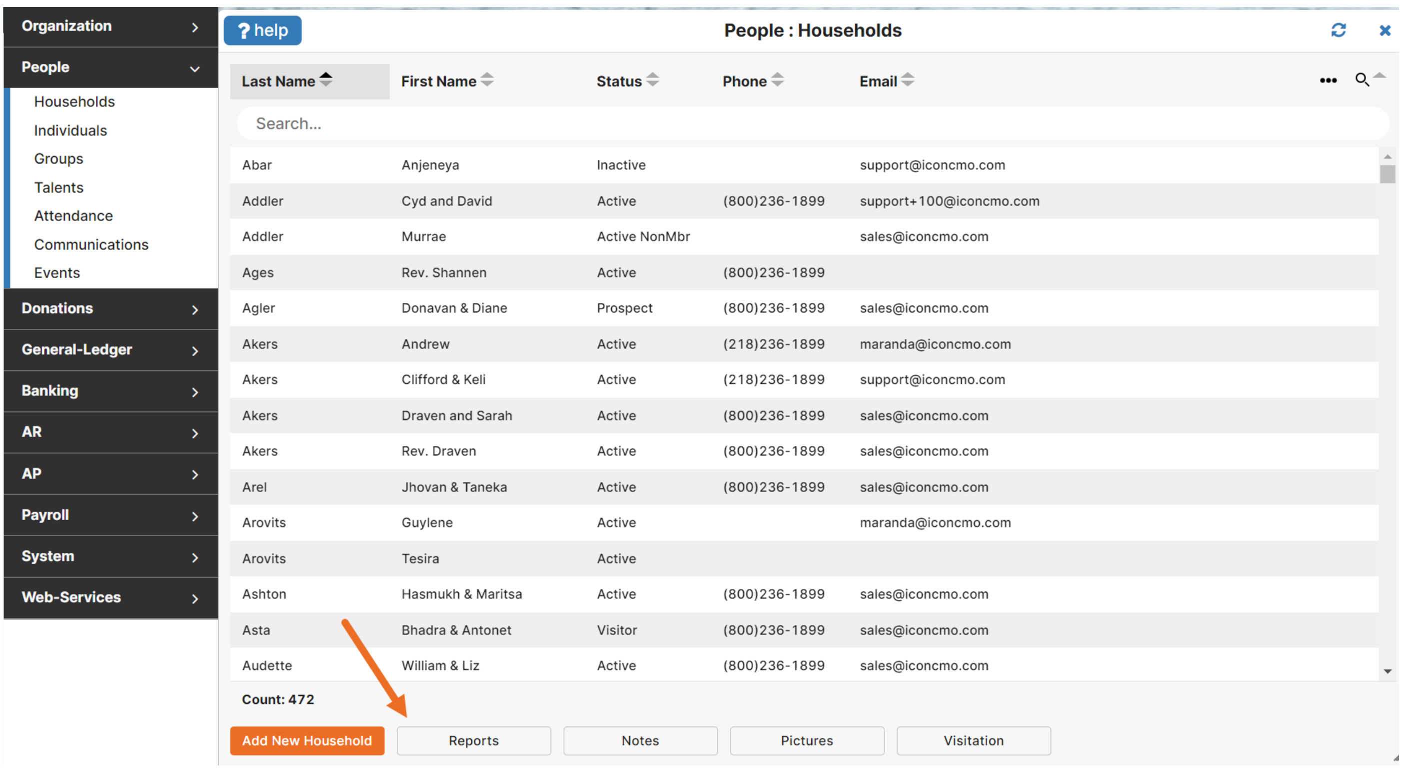
o Allows the user to turn the 'Auto Add' feature on or off for automatically adding individual records when a household record is created, thus saving considerable time in creating the necessary individual records. When turned on, this feature will create individual records for those people automatically when there is either an ampersand (&) or the word 'and' between the first names. For example, John and Mary or John & Mary could be used when creating the household record, and the system will automatically create a 'John' individual record and a 'Mary' individual record. This saves time as you will only have to add individual records for the children or other individuals living in the household.

o **Organization→ Setup→ Information**

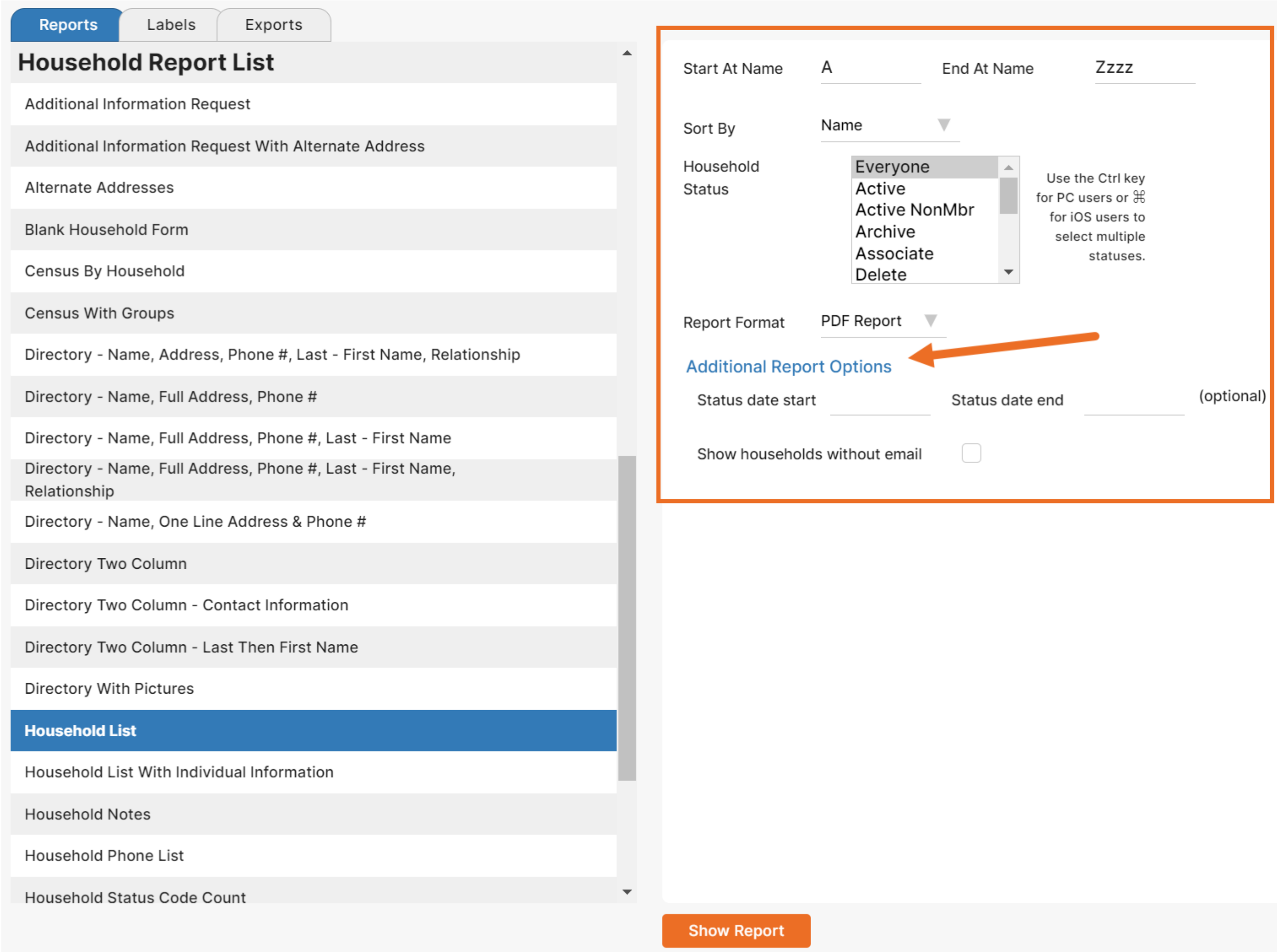
This screen allows you to input the church's name, address and contact information that will be used throughout the system. It also allows you to upload a church logo which must be .jpeg format and a minimum of 75 X 75 pixels and a maximum of 150 X 150 pixels.

Running Reports, Exports, Labels or Graphs

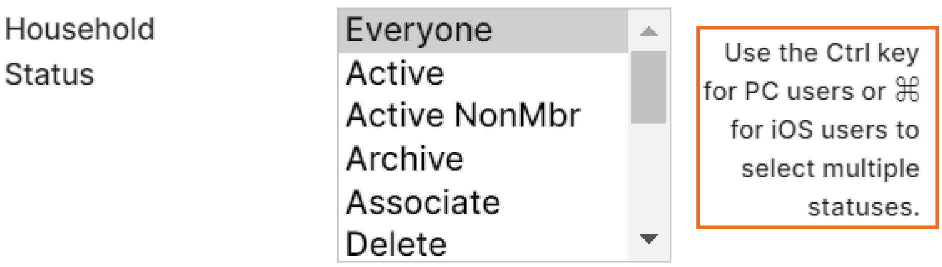
o Many screens on the membership side of the system will give you a list of reports for that module. When you decide what you would like to report on, go to the area where you input that type of information. Below is an example of where to find the reports for information on Households.



o When selected, the report list appears on the left side of the screen. The 'Household List' report is highlighted and selected in the image below. When you select a report, the filtering criteria for that report will appear on the right. Be sure to look out for an 'Additional Report Options' link as indicated by the arrow below. Click the link to view additional report criteria options. Set the criteria for the report and the output format (PDF, Excel, HTML,) as shown. Then click the 'Show Report' button to run the report. If you attempt to output the report to PDF and it doesn't appear on-screen, follow these instructions to set your browser and PDF software correctly.

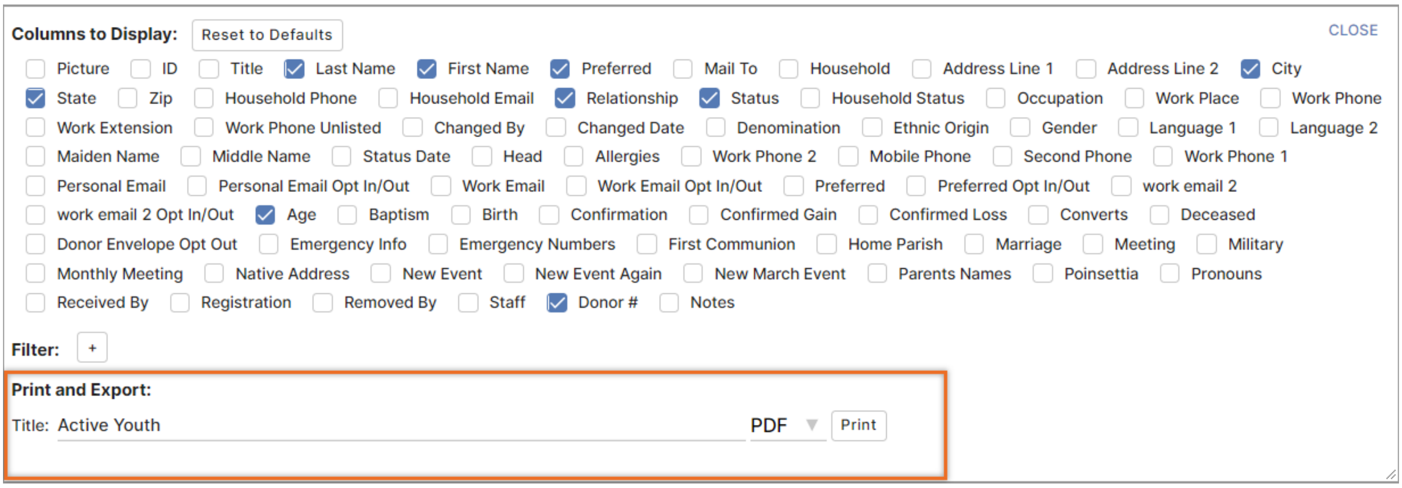


o Various report screens will also allow you to select multiple status codes. This is noted by a message that says 'Use the Ctrl key to select multiple statuses', and is pictured below. With the Ctrl key held down, use the mouse to click on the status codes you wish to include. When you're done making status selections, release the Ctrl key and run the report.

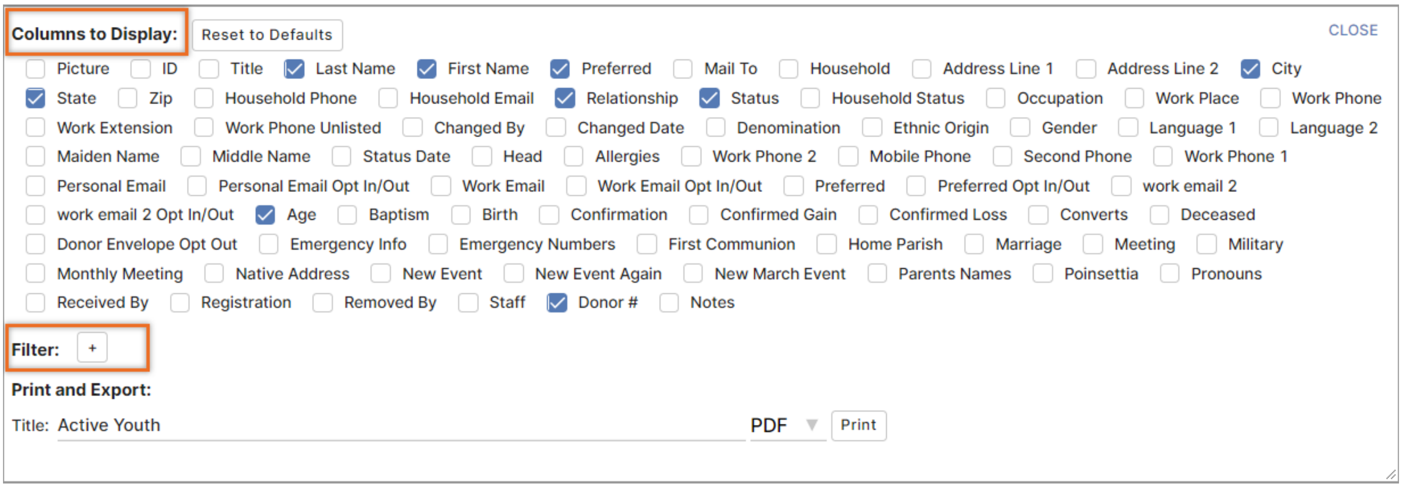


Note: When running reports, it's beneficial to understand what kind of data you are seeking. For example, if you are looking for a birthday report, you would go to the individual reports, not the household reports. Why? Because households don't have birthdays – individual people do. In the same manner, if you were looking for a directory or address labels, you would go to household reports, as directories and household reports have address and household information with some individual information.

- o Additionally, you can run custom reports from several screens in the system as well. The images in the examples below are from the People→ Individuals screen.

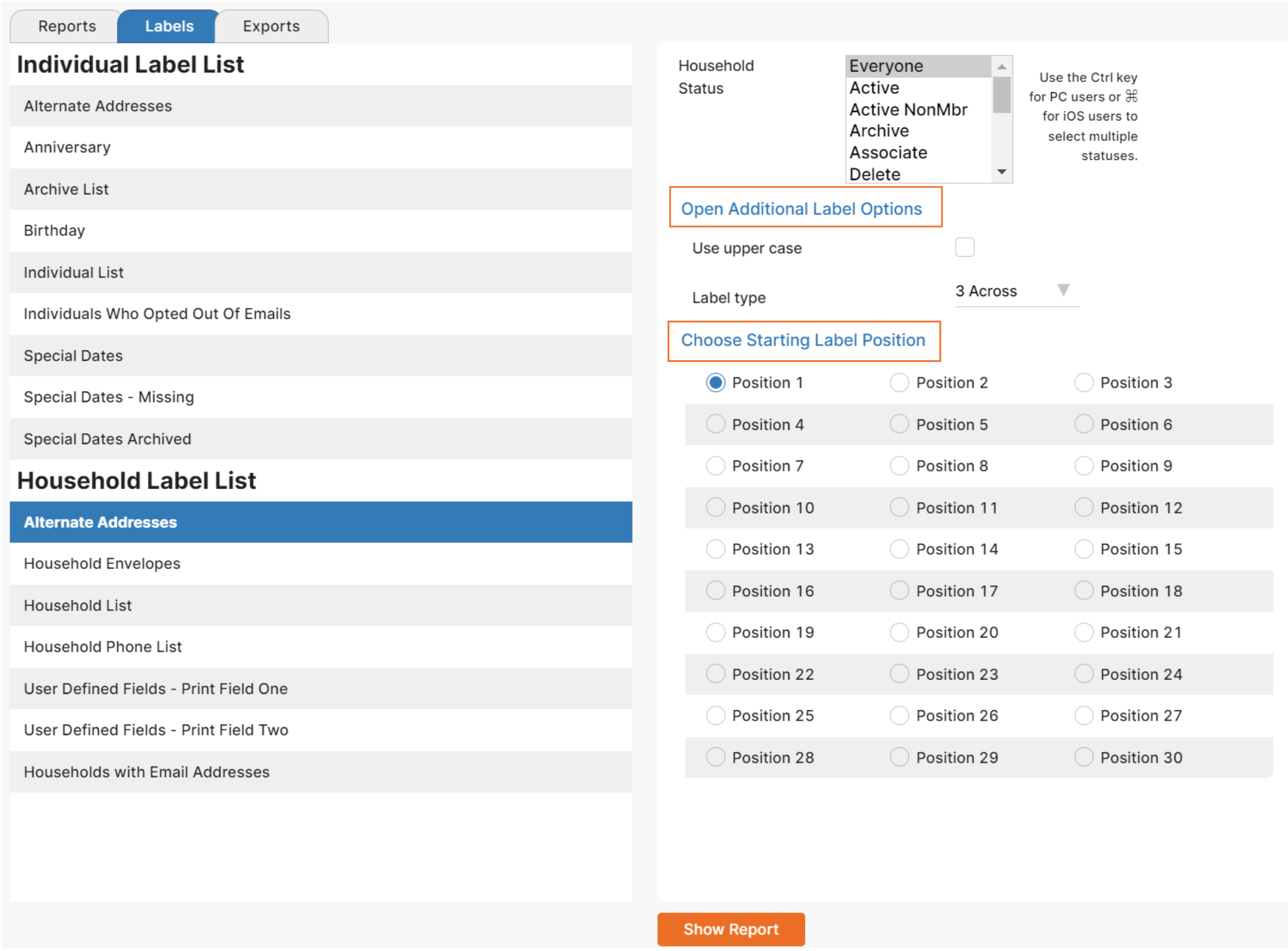


- o The title is populated by default, however you can change the name by overwriting the text in the field. You can also choose which format to display the report, PDF, HTML or Excel. The report will have what your screen shows based on the columns you have selected to display and the filters that you have added.

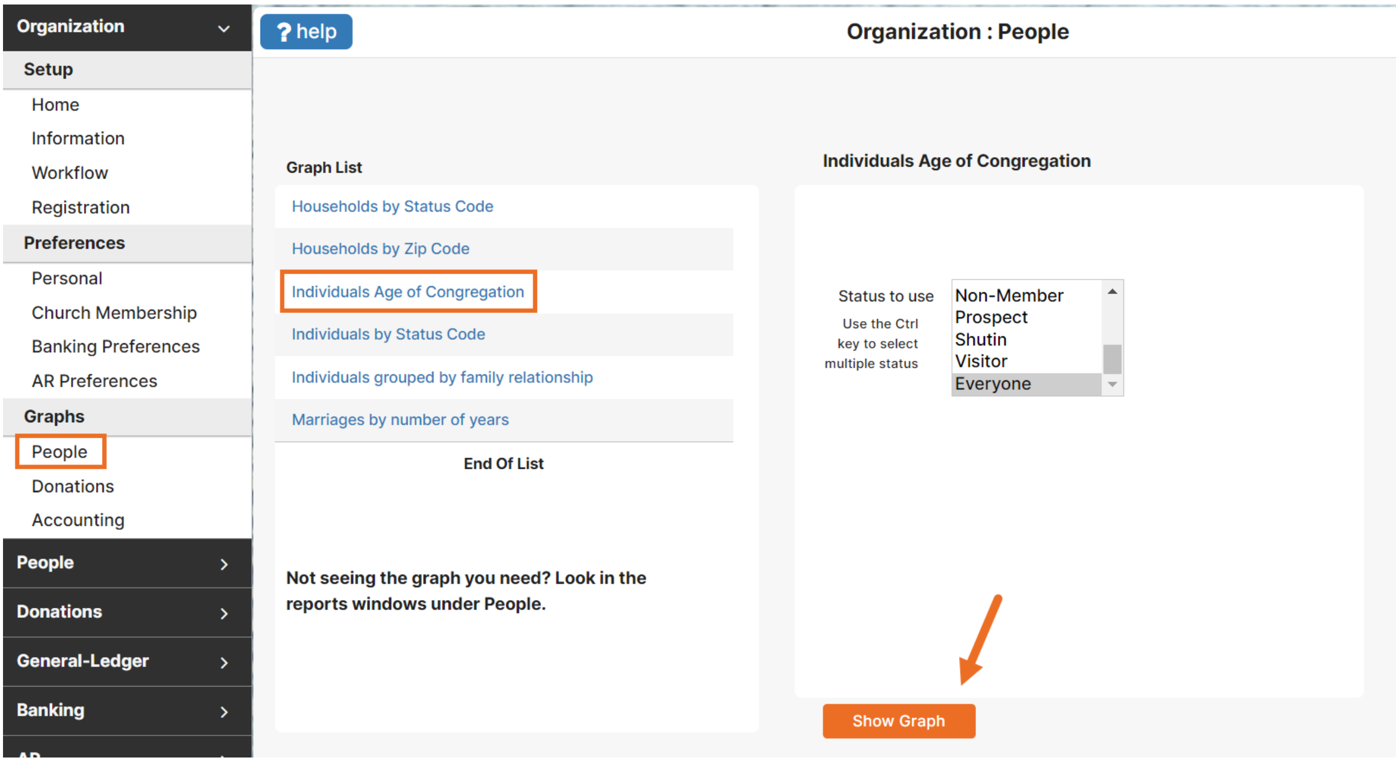


- o The selections made will be remembered by the system when you exit those screens so that the next time you visit them, the same selections will be displayed. There is a 'Reset to Defaults' option that will clear all previously selected filters and criteria from that screen.

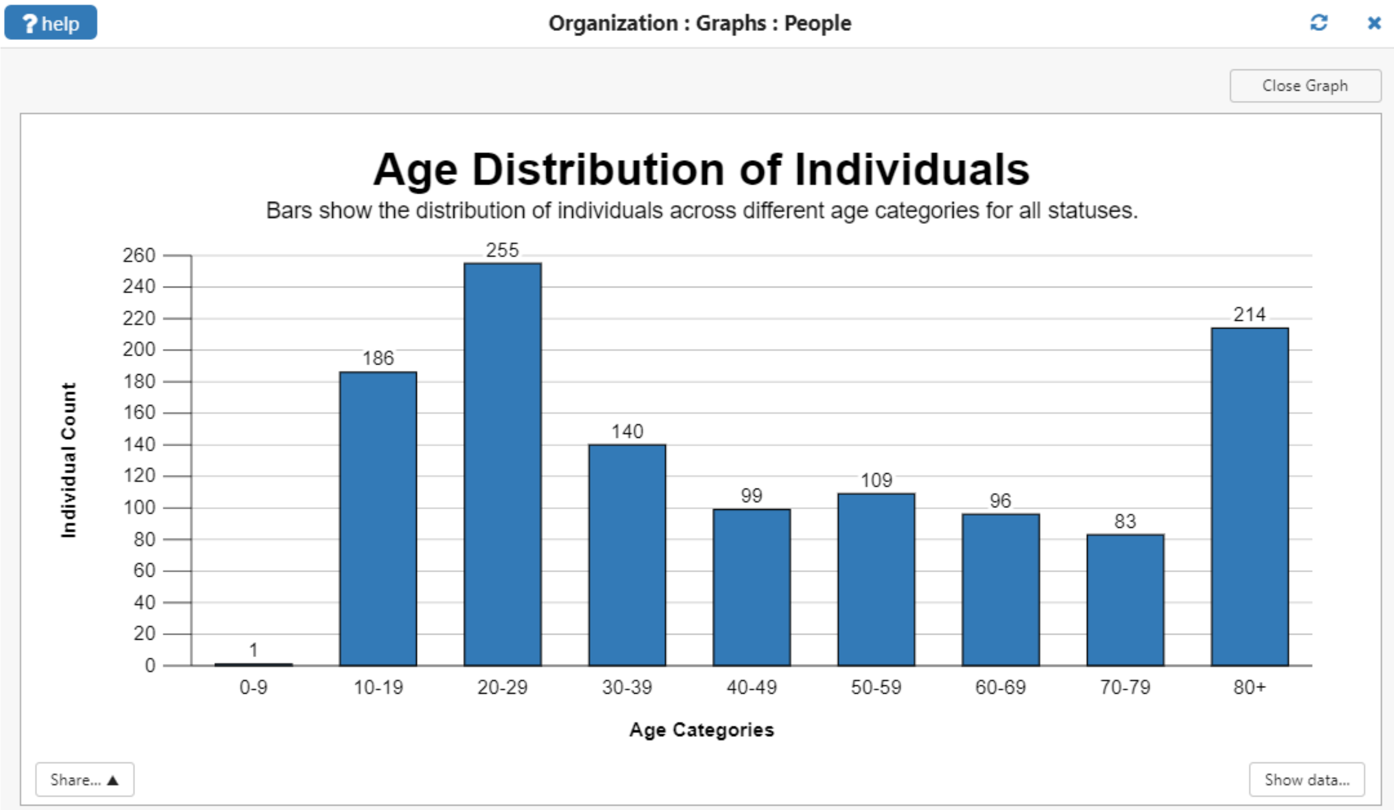
- o Creating a label or an export on the system is very similar to how reports are created in the Reports screens of each module. Choose the tab that has the word 'Exports' or 'Labels' and you will see a list on the left where you can choose one of the exports or labels, which will then display the filtering criteria on the right. Once your criteria is selected, click the 'Show Report' button. For Exports, you can either select 'Excel' or 'tab delimited' for the file type using the drop down list that is just below the status box. For Labels, you can choose 1 across, 2 across or 3 across. You can even choose the label starting position. Just be sure to click on the links for additional options.



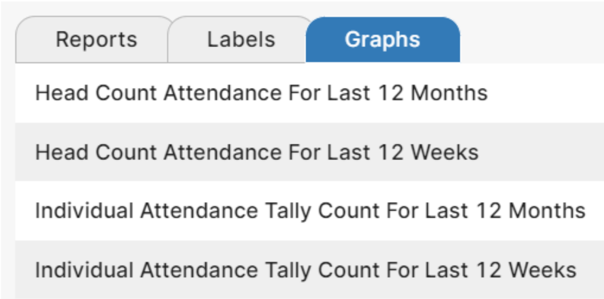
o Graphs are run in the exact same way as reports. Graphs can be found under Organization→ Graphs→ then selecting either People, Donations, or Accounting. Below is an illustration of the 'People' graph screen, which shows the 'Individuals Age of Congregation' graph.



- After you click the 'Show Graph' button, the graph will appear on the screen as seen below. On this screen there are several options. Under 'Share' you can either download the graph as an image or a PDF, or you can copy the image to your clipboard so you can attach the file to a newsletter or an email.



o Some of the graphs, such as attendance graphs can be found in the reports screen in their own tab.



<u>How Do I...?</u>

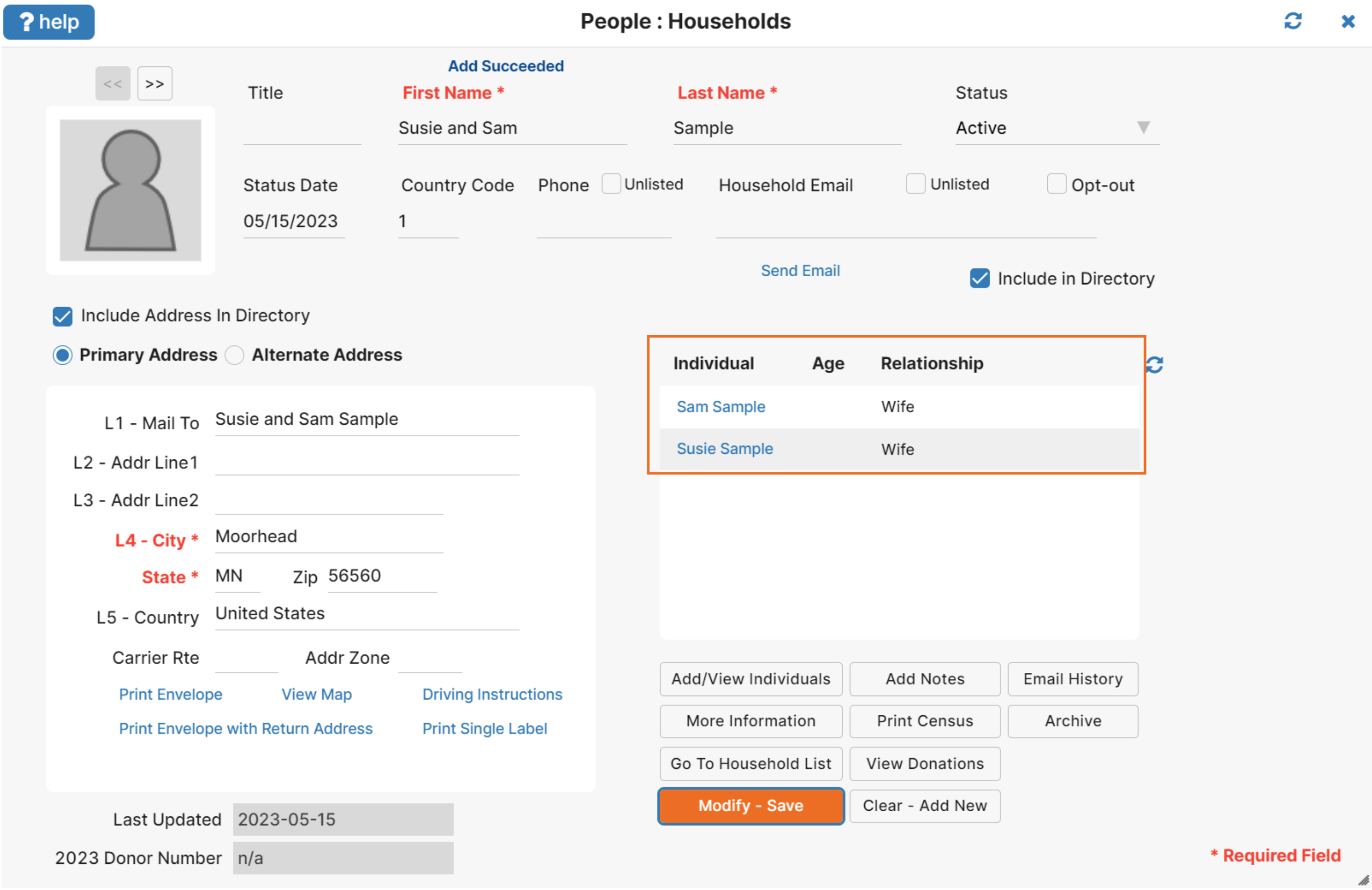
<u>Add an Individual or a Household</u>

The following are helpful hints relative to household field definitions, and you should keep these in mind when adding this type of data to your system. Consistency is the key to good data entry and to have good accurate reports.

- o Title:
  - If Married Couple, Title = Mr. & Mrs. or Mr. & Dr.
  - If Single Person, Title = Mr. or Mrs.
  - Many People will leave this field blank.
- o First Name:
  - If Married Couple, First Name =John & Mary or Mary & John
  - If Single Person, First Name =John or Mary
  - This field is never blank. It must contain the Head(s) of households (i.e. the responsible parties in the household.)
- o Last Name:
  - If Married Couple with the same last name, Last Name = Anderson
  - If Married Couple with different last names, Last Name = Anderson(Smith) The primary last name of the household would be Anderson and the Secondary name would be Smith.
  - If Married Couple has different last names and the one is hyphenated, the last name Smith after the name Anderson: Last Name = 'Anderson(-Smith)'. The parentheses are important here to distinguish that one person does not hyphenate their name.
  - If Married Couple both hyphenate their last names, Last Name = Anderson-Smith
- o Status:
  - The status field is used to designate different types of households. The system offers four default status codes of Active, Inactive, Visitor and Delete. You can add as many statuses as needed by going to Organization → Preferences→ Church Membership. On the right side, locate the section labeled Modify The Contents of a Drop Down List. In the field 'Select Drop Down List', select 'Status'. Enter the Status you wish to add in the New / Modified Value and click the 'Save New' button.
  - Do not add a status code where an individual can fall into more than one code. Example: don't add 'choir' since a Choir member can also be an Active Member. Don't add 'employee' since an employee could be Active or Friend. Choir members belong to Groups.
- o Status Date:
  - The Status Date can be used in several ways. Most will change the status date each time the household Status is changed. Some will change the date every time a field is modified on the window. You could also use it as the date the household joined the church

Note: IconCMO has a feature that when turned on will add individual records for the main people named in the household record automatically. Please see System Overview to see how this works.

In our example here, we are adding a household for Susie and Sam Sample so we included both names in the First Name field. When we save the household, individual records for both of those people are added. Click 'Add/View Individuals' to add additional individuals to the household such as children.



- o Single Person Household – If you are adding a new person in the system that is the only individual in their household, the household record would be added first, reflecting the physical residence and then one individual record would be added representing the individual living at that location.

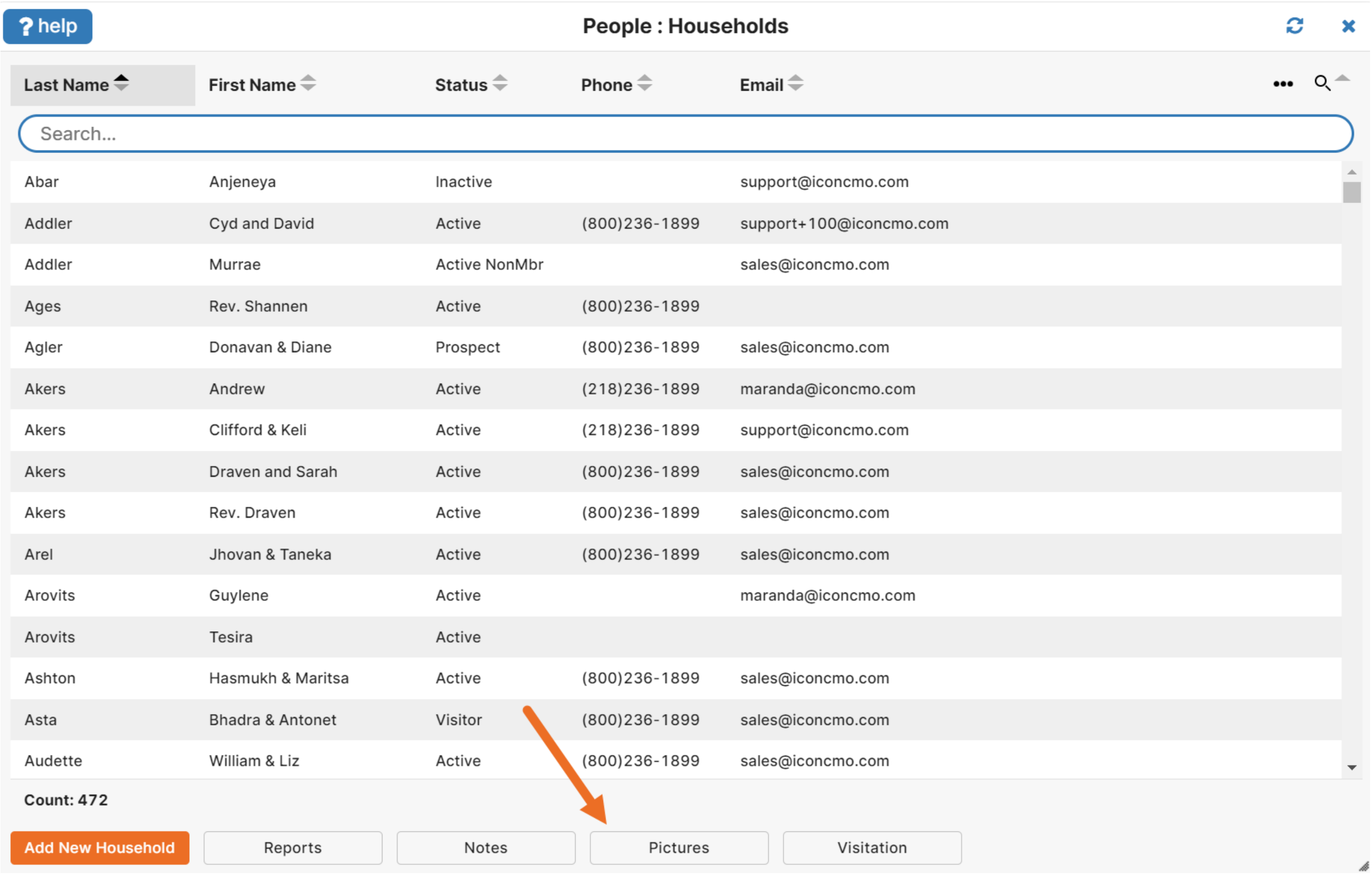
- o You can watch this video on how to add a household to IconCMO.

Add a Household Picture for the Pictorial Directory

You can access the screen for uploading Household photos in two ways. The screen works the same way in both instances.

- o In the household record, you can click the image in the upper left corner of the household screen. If there is no household picture on the system yet, it will appear as shown below. Hover your mouse over the picture and click on it. The 'Household Pictures' screen will appear.

o Another means of access is by going to the People→ Households screen. At the bottom of the household screen, there is a 'Pictures' button.



? help

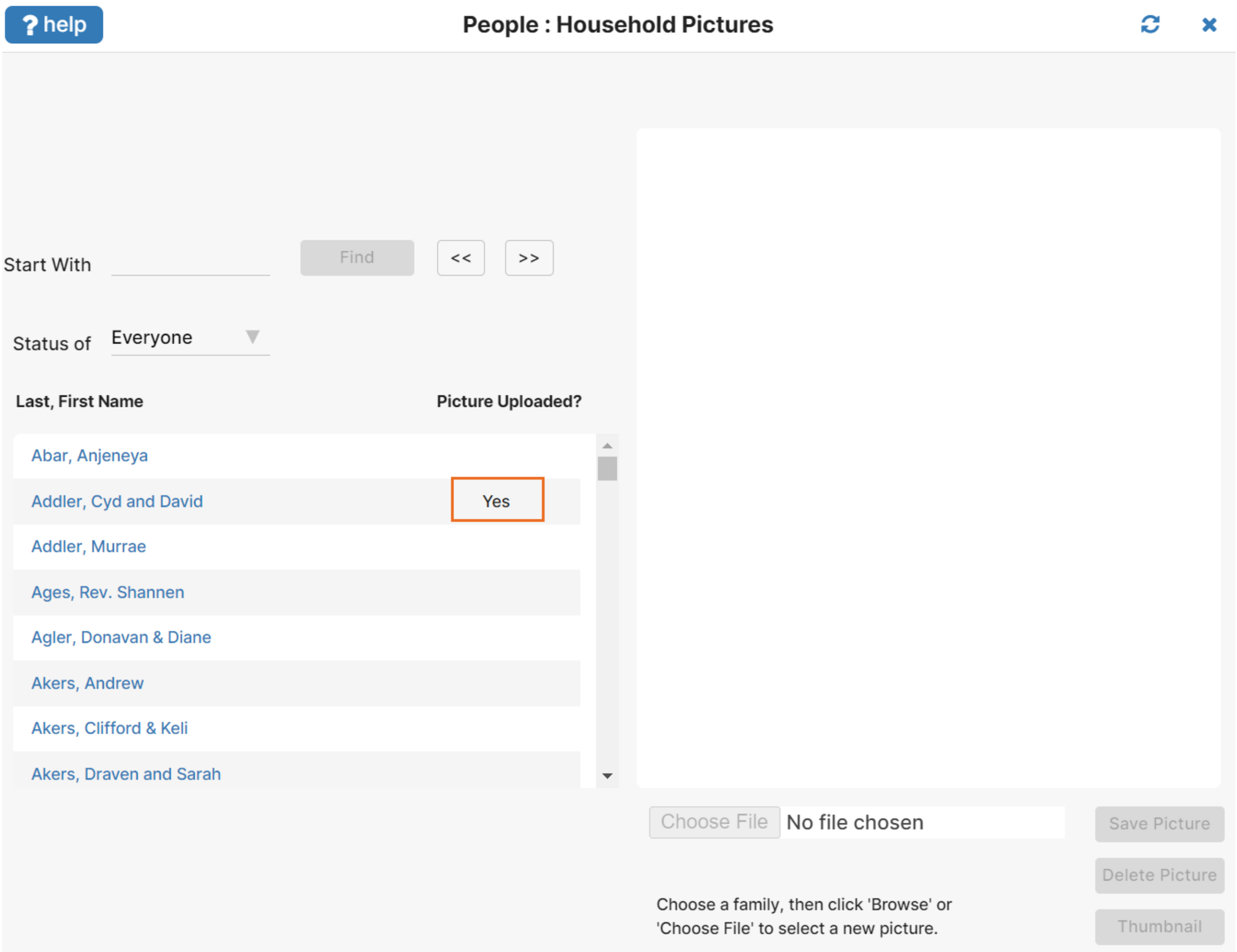
People : Households

Last Name	First Name	Status	Phone	Email
Abar	Anjeneya	Inactive		support@iconcmo.com
Addler	Cyd and David	Active	(800)236-1899	support+100@iconcmo.com
Addler	Murrae	Active NonMbr		sales@iconcmo.com
Ages	Rev. Shannen	Active	(800)236-1899	
Agler	Donavan & Diane	Prospect	(800)236-1899	sales@iconcmo.com
Akers	Andrew	Active	(218)236-1899	maranda@iconcmo.com
Akers	Clifford & Keli	Active	(218)236-1899	support@iconcmo.com
Akers	Draven and Sarah	Active	(800)236-1899	sales@iconcmo.com
Akers	Rev. Draven	Active	(800)236-1899	sales@iconcmo.com
Arel	Jhovan & Taneka	Active	(800)236-1899	sales@iconcmo.com
Arovits	Guylene	Active		maranda@iconcmo.com
Arovits	Tesira	Active		
Ashton	Hasmukh & Maritsa	Active	(800)236-1899	sales@iconcmo.com
Asta	Bhadra & Antonet	Visitor	(800)236-1899	sales@iconcmo.com
Audette	William & Liz	Active	(800)236-1899	sales@iconcmo.com

Count: 472

Add New Household | Reports | Notes | Pictures | Visitation

- This will bring you to the household pictures screen as seen below.
- Any household that already has a picture will have a 'Yes' in the 'Picture Uploaded?' column.



1. Select the household on the left to upload a picture for.
2. Click 'Choose File' and locate the picture on your computer.
3. Click 'Save Picture'. The system will take a few seconds to upload the picture. Once done, you should see the uploaded image on the right.
4. You can delete a picture by choosing the household on the left and clicking 'Delete Picture'.

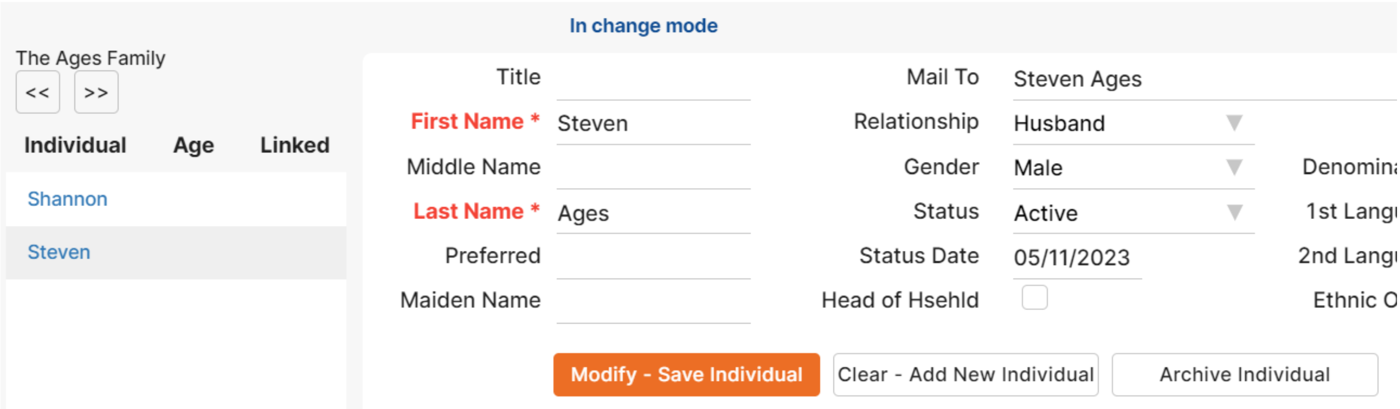
Note: This same process can be done to upload individual photos under the Individuals screen.

Add an Individual

An individual must be attached to a household. Therefore you cannot add an individual unless the household exists first. If you need to add a household first, please see the topic 'Adding a Household'.

1. Go to People→ Households.
2. Click on the name of the household you wish to add an individual to.
3. Click 'Add/View Individuals' in the bottom right. This will bring you to the Individual Form.
4. Enter the Individual's first and last name. Other data that can be entered includes relationships within the household, gender, denomination, language, ethnic origin, status, preferred and maiden names.

5. Click 'Save Individual' to save the record. The individual's name will appear on the left side with the other individuals' names in the household, as seen below.
6. To add another new individual, press 'Clear-Add New Individual', and follow the above steps for the next individual in this same household. It is not necessary to go back to the household list unless the individual you're adding belongs to a different household.



o You can also watch this video on how to add an individual into IconCMO.

Add, Update or Delete Individual's Information

When updating an individual's information in IconCMO, it is generally done all in one place – under the individual record.

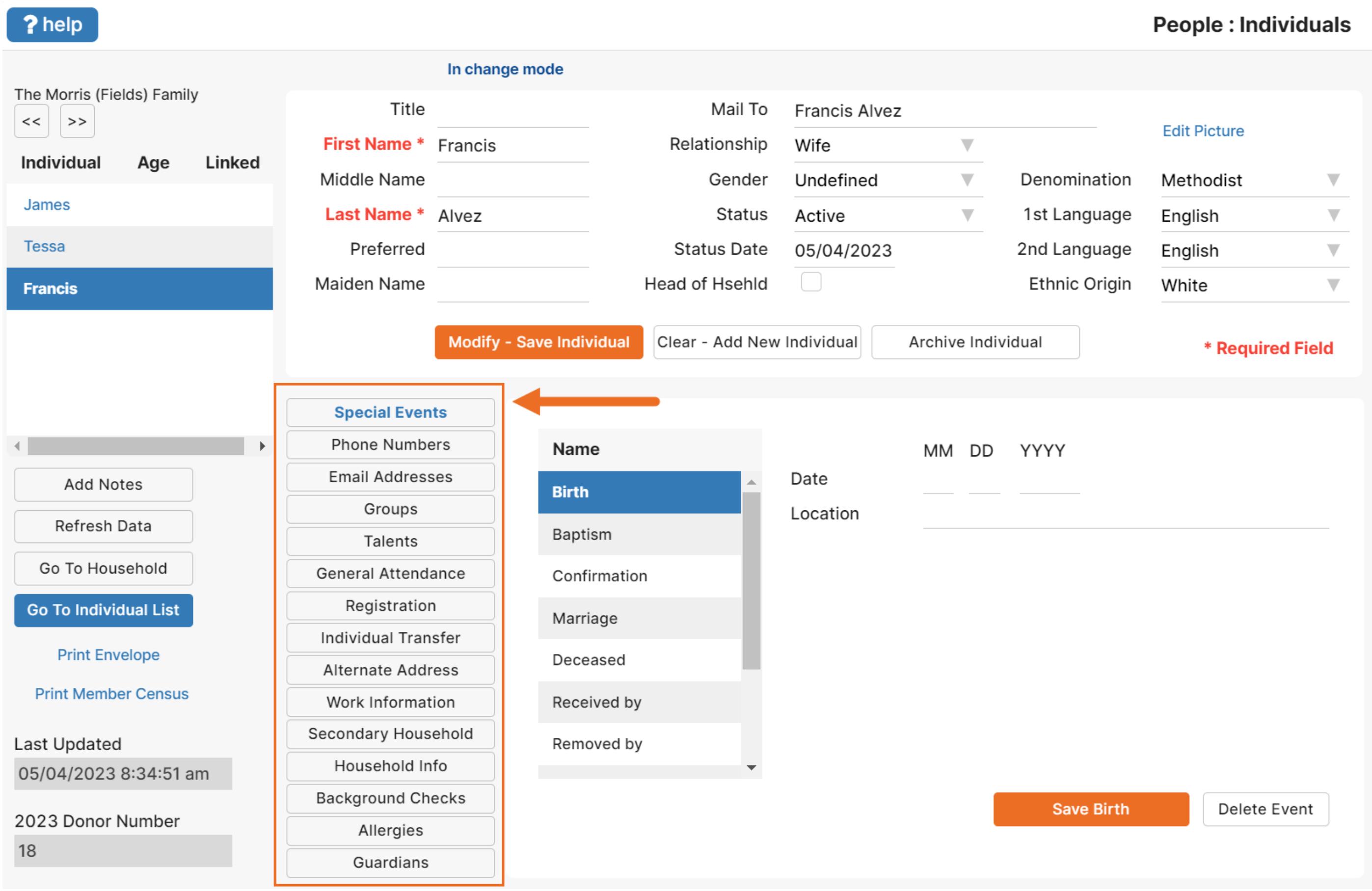
1. Go to People→ Individuals.
2. Click the individual that you wish to modify data for.
3. Select the data you want to modify. You can modify any of the information mentioned in 'Add individuals' process or any of the options seen in the orange box in the image below, such as Special Events, Phone Numbers, Email Addresses, Groups, Talents, General Attendance, Registration, Individual Transfer, Alternate Address, Work Information, Secondary Household, Allergies or Guardians (works with Check In Kiosk in the Events module.)

▪ General Attendance can be viewed on this screen but cannot be modified. To modify attendance, go to the Attendance module.

▪ Registration can be viewed on this screen but cannot be modified. The entries in this screen come from an individual's registration to an event that was created in your Events module.

▪ 'Household Info' can be viewed on this screen but cannot be modified. To modify household info, click 'Go To Household' on the left side.

▪ 'Background Checks' is an option that gives you an integrated link to log into ActiveScreening Faith directly from this screen once you have signed up for it. If you have never signed up, this screen will display a message to find out more by following a link to our app market.



- o Depending on which option you choose from the list outlined in the picture above, the information in the area to the right will change allowing you to enter in the appropriate data. For many of the options, a save button will also appear in the area to the right for you to click once you are done adding or changing the data. If you wish to delete the data, many of the options use the delete button in the same area. Don't confuse the save or delete button in the bottom portion of this screen with the 'Modify- Save Individual' or 'Archive Individual' buttons for the primary individual form at the top of this screen or you may not get the desired results

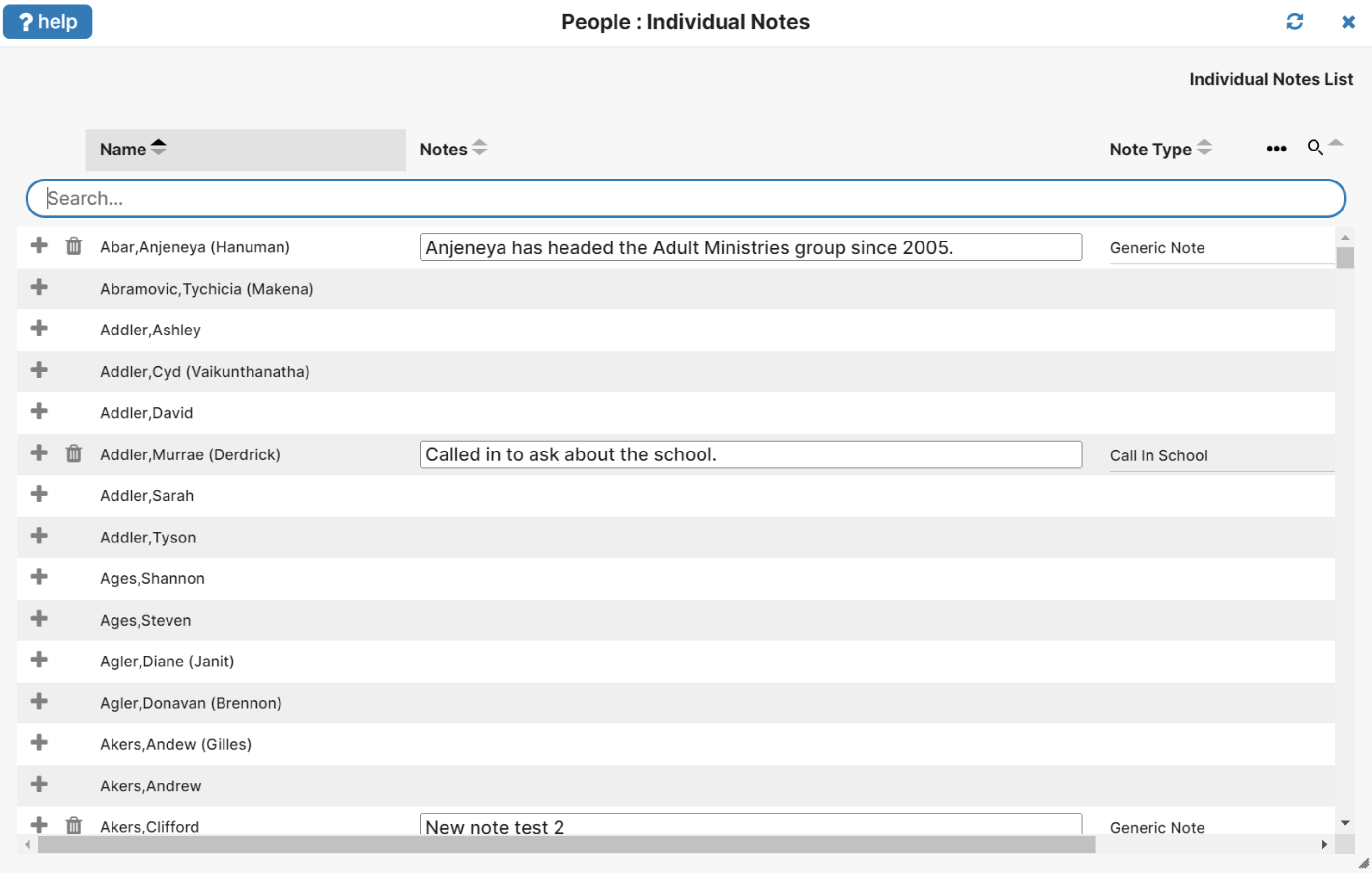
Note: You can customize many of the drop down menus such as Special Events, Phone Name, E-mail Name, Occupation by going to Organization→ Preferences→ Church Membership→ Modify Contents of a Drop Down List, Maintain Phone - Email Types, or Maintain Special Event Types. To add Groups or Talents to the drop down lists, see the “Add Groups” and “Add Talents” sections at the end of this guide.

Add Notes to an Individual

You can access the screen for adding individual notes in two ways. The screen works the same way in both instances.

1. Go to People: Individuals. Click on ‘Notes’ at the bottom of the window, or open a specific individual record and click ‘Add Notes’ on the left. (If notes already exist, the button will say ‘Add/View Notes’.

2. Click on the plus sign to the left of the individual's name that you want to add a note for. A new window will open for you to document the note.



3. Type your note and click ‘Close’ to complete the note. Once you are back on the main window you can enter a note type, and dates.
4. To add additional notes types, go to Organization: Preferences: Church Membership. Choose the list for Note Type under ‘Modify Contents of a Drop-Down List’.
5. To edit a note, click on the text of the note to open it and make changes. To delete a note click on the trash can icon to the left of the note.

Note: Household Notes are a bit different. Select your household from the list on the left. Type in your notes in the box to the right, and then click the 'Save Notes' button near the bottom of the window. There is only one note box per household, and no note types to label them.

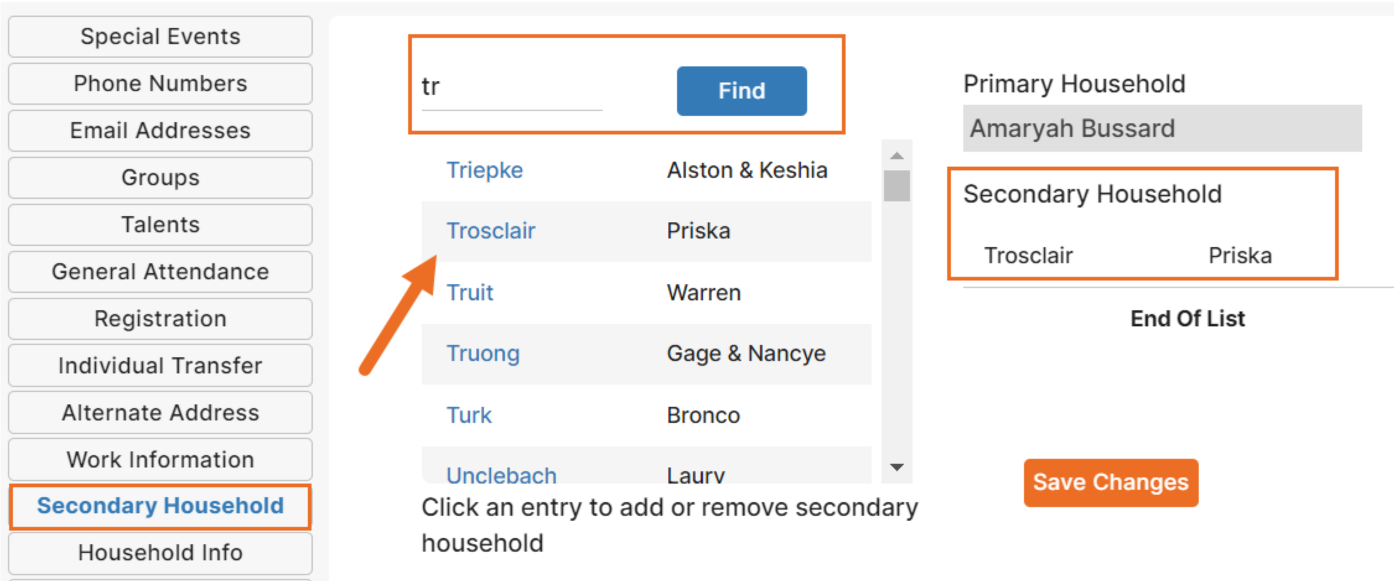
Record children in multiple household situations

The Secondary Household feature is used to identify other households an individual might belong to. The most common use is when a child of divorced parents spends time at both houses.

1. On the individual record locate the Secondary Household tab. The Primary Household that the individual is in will be listed on the right.
2. To add a secondary household, enter a few letters of the last name, and click ‘Find’.

3. Select the household from the list below, and that household name will appear on the right under Secondary Household. You can add multiple Secondary Households.
4. Make sure to click 'Save Changes'.

o To remove a Secondary Household from the list, simply click on the name of the household.



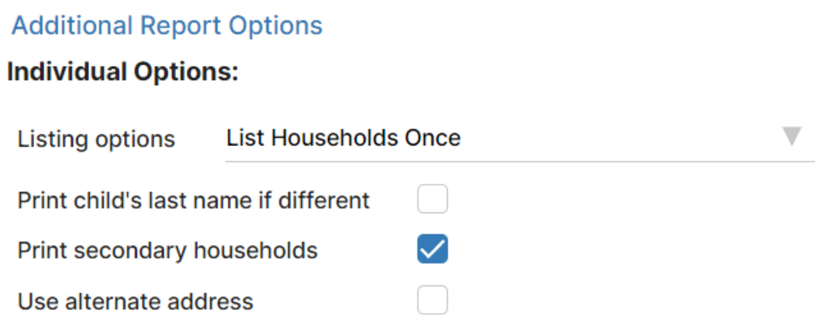
o In the primary household record, you will see a checkmark under the 'Linked' column next to the individual, denoting that there is another household linked to that particular individual.

Individual	Age	Relationship	Linked
Amaryah Bussard	88	Single Female	✓
Denise James		Wife	

o You will also notice in any secondary household that the individual is listed in the family members box, and in the 'Linked' column you will see the last name of the primary household. When you click on the name under the 'Individual' column for the linked individual, the system will bring you back to that individual's record within the primary household.

Individual	Age	Relationship	Linked
Priska Trosclair	75	Single Female	
Hiwot Trosclair	25	Daughter	
Amaryah Bussard	88	Single Female	Bussard

o When printing directories, the individual who is linked to multiple households can be displayed under all linked households when the 'Print secondary household' option is selected under 'More Settings' in the report criteria. You may also choose to print the child's last name (or not) if it is different from the household last name.



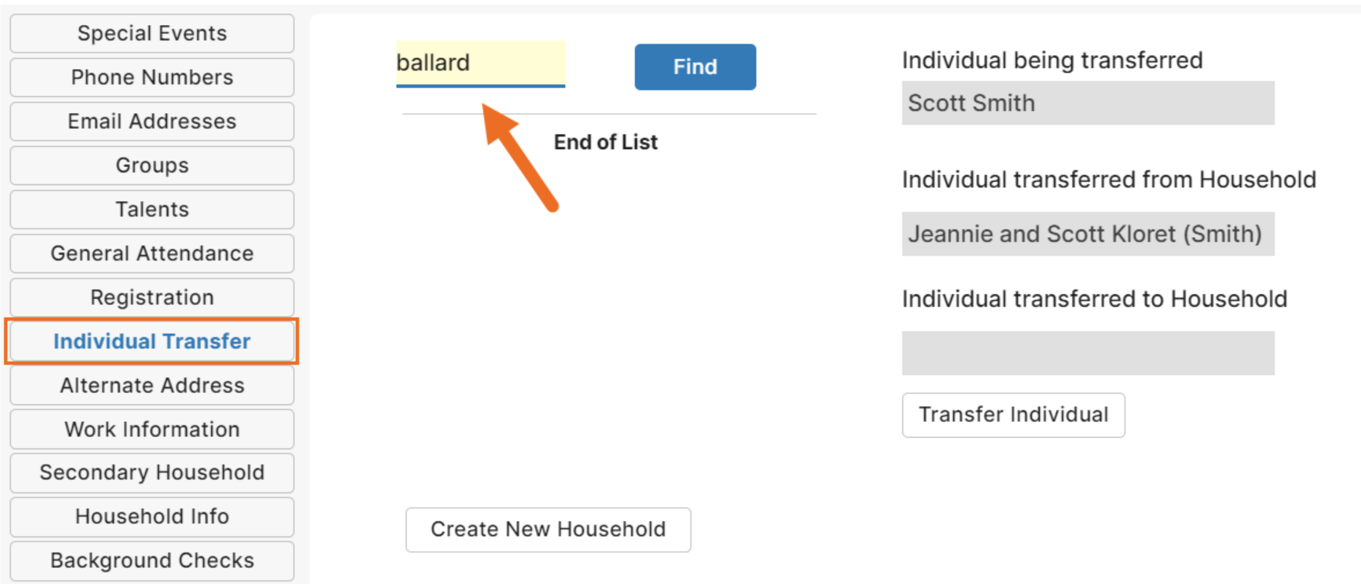
Note: Links to secondary households are removed when the households or linked individuals are archived. To retain this information in the archives, you will have to enter it manually in the notes.

Transfer or Move an Individual from One Household to Another

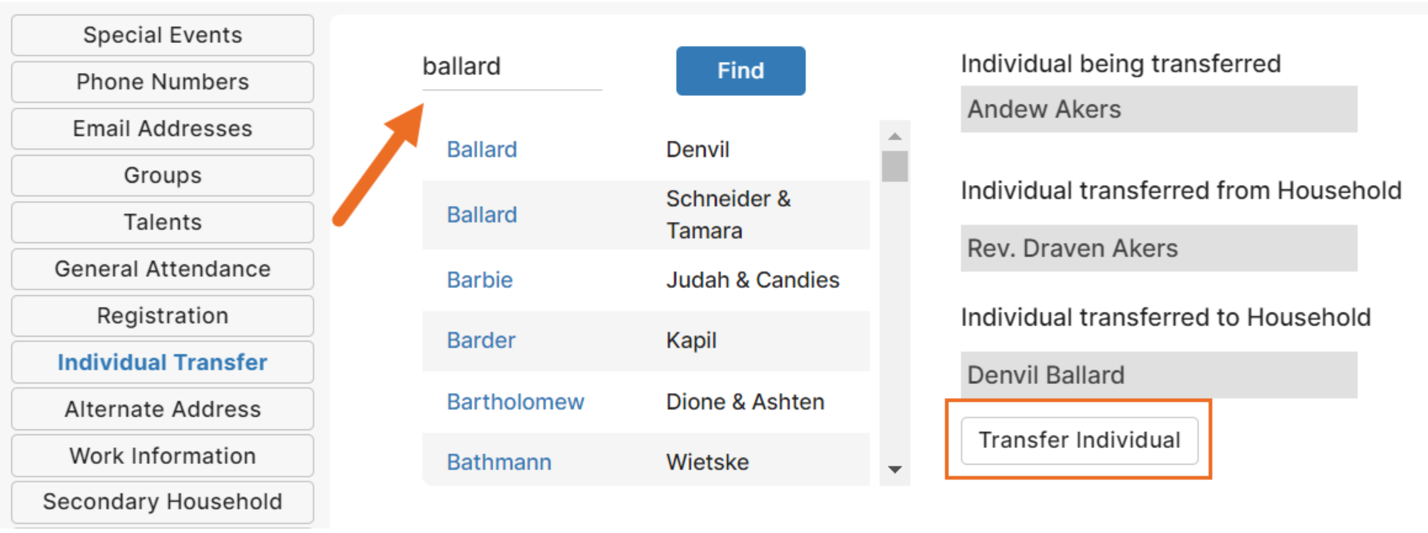
This window is used anytime you need to move someone out of their current household and into a new household.

- o If transferring to another household that already exists in the system:

1. Go to People→ Individuals.
2. Click on the individual you wish to transfer.
3. In the list of data entry options on the bottom left, select 'Individual Transfer'.
4. In the white box next to the 'Find' button, enter the Last Name of the household you wish to transfer the individual to and then click the 'Find' button.



5. Click on the Last Name of the Household you wish to transfer the individual to.
6. Press the Transfer Individual button.

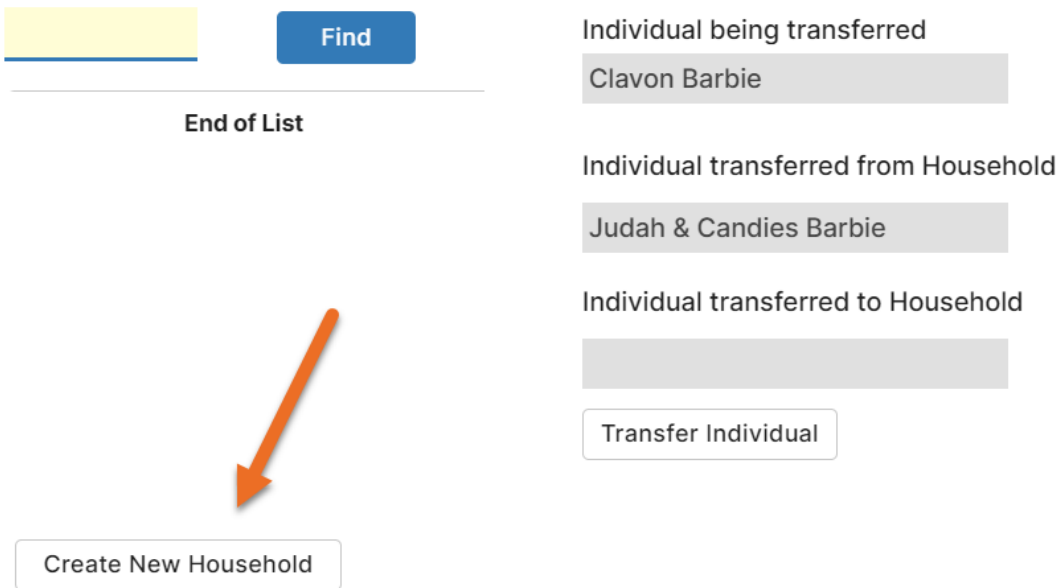


o If the individual is moving into a household that does not yet exist:

1. Go to People→ Individuals.
2. Click on the individual you wish to transfer.
3. In the list of data entry options on the bottom left, select 'Individual Transfer'.
4. Click on the button to 'Create new Household'.

- It will automatically create the household based off of the individual's name and move the individual into that household and out of the original household.

- All existing information about that individual including groups, talents, attendance and giving records will remain with the individual and transfer to the new household.

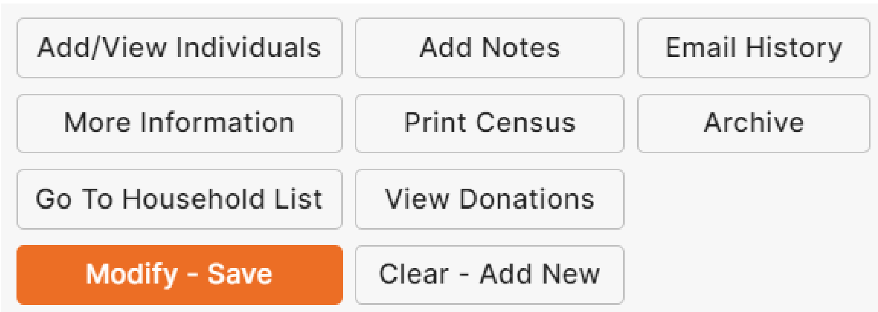


Recording Deceased or Transferred People

There are two ways of doing data entry for deceased individuals, depending on your situation.

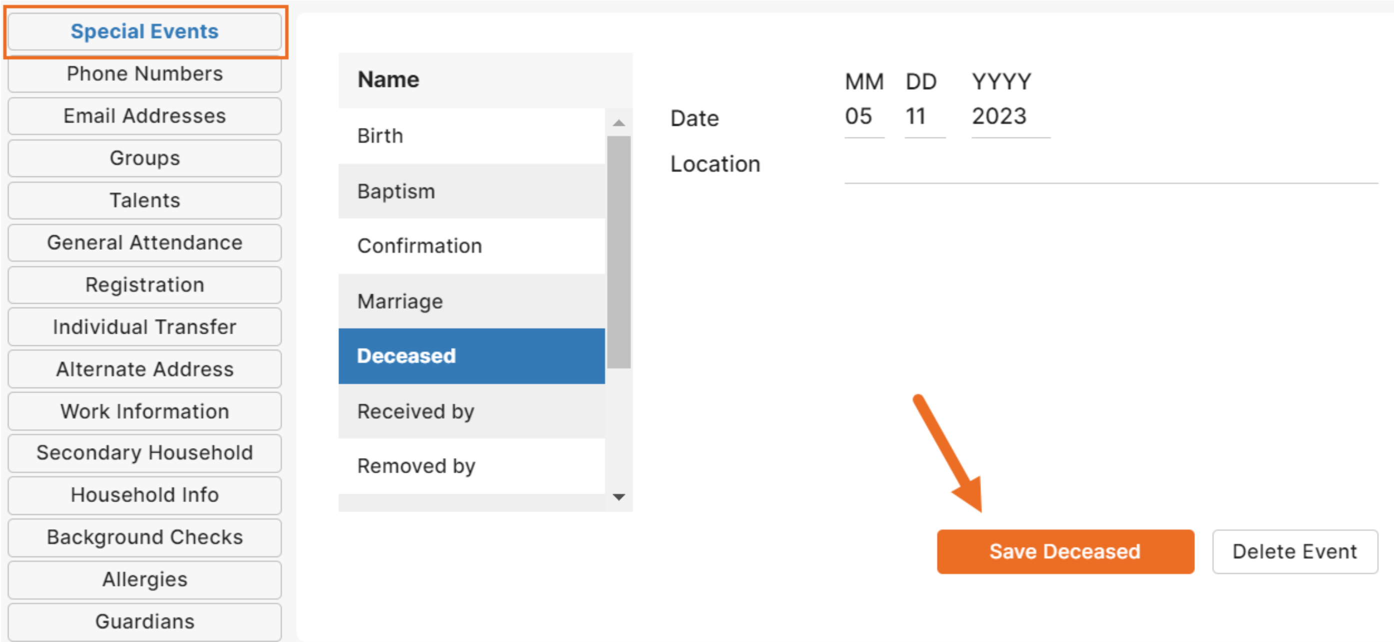
o If the person is the only individual in the household:

1. First, check to see if any donations are attached to the deceased individual or their household.
2. If there are, then you will want to go to Donations→ Statements and print 2 copies of the statement for that household. One for the church records, and one statement should be mailed to the person handling the estate for this individual.
3. Since this is the last person in the household, you can archive the entire household. Go to People→ Households and locate the household and click on it to view the record.
4. Click 'Archive' in the bottom right of the Household screen.
5. A message will pop up asking you to enter a reason for archiving the individual. Enter 'Deceased.'
6. Click 'Archive'.



o If the household the deceased is in has other individuals in it:

1. Go to People→ Individuals and locate the deceased individual and click on it to open their individual record.
2. Add a deceased date for the individual under their special events.



3. Once this is added, click the ‘Archive Individual’ button.
4. A message will pop up asking you to enter a reason for archiving the individual. Enter 'Deceased.'
5. Click 'Archive'. When you're done the household will still exist, but that specific individual will no longer appear in the household.

o The information will be retained and the individual can be unarchived if needed.

1. Go to People→ Individuals
2. Click on ‘Archives’ at the bottom
3. Locate the desired individual.
4. Click on the record to open
5. Choose ‘Unarchive’ in the bottom left corner.

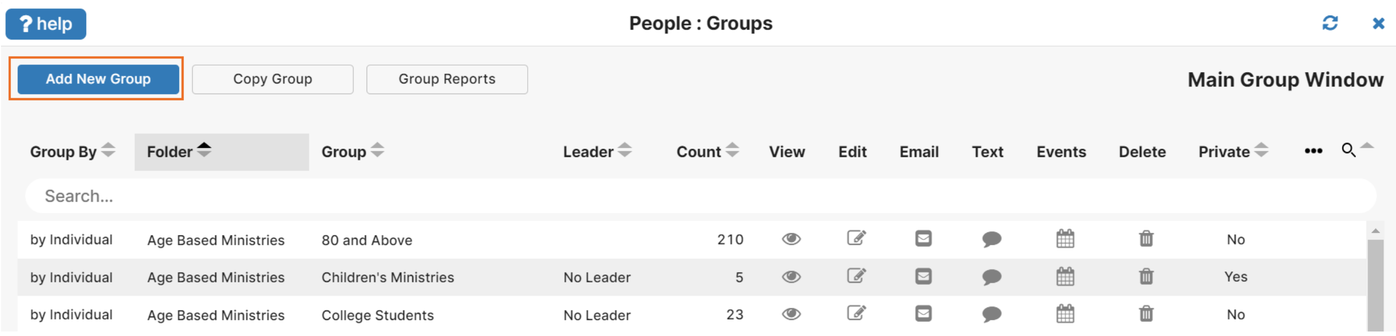
▪ You can delete individuals once they are in the archives, however we don’t recommend deleting individuals unless they were entered into the system in complete error.

Note: Archived individuals don't count against your household count for pricing, so you can have as many records archived as necessary.

Add A Group

Note: As of January 2022 **household groups are a legacy feature.** To learn more about household groups visit the What is a Group? section of this guide.

1. Go to People→ Groups.
2. Click ‘Add New Group’ at the top of the screen.



3. This will create a brand new line in the Group list. Overwrite the text to enter the folder which the group belongs to and assign the group a name.

▪ The default, as seen below, is to place all groups into a folder named ‘Folder’ and assign them a name with a group number, like ‘New Group 129’.

Group By	Folder	Group	Leader	Count	View	Edit	Email	Text	Events	Delete	Private
Search...											
by Individual	A new Folder	A New Group 110		0							No
by Individual	Age Based Ministries	80 and Above		210							No

o Naming the Group Leader and marking the group as Private are additional options.

1. Group Leader defaults to 'No Leader' but can be overwritten
2. To change a group to Private click on the 'No' button which toggles to 'Yes'. Marking a group as private would prevent the individual from seeing that they are a part of the group when viewing their information in the Member Portal.

Assign Individuals to Groups

Once groups have been created, individuals can be assigned to them. There are two ways to do this.

o From the Groups window:

1. Once groups and folders have been added, add group members by clicking the icon in the 'Edit' column for any given group to launch a new screen.
2. Use the check boxes to add or remove members from the group.
3. You can also use the filters and/or the "Assign All" and "Remove All" buttons to quickly add or remove individuals.
4. Click 'Close' to exit the edit window.

Folder Age Based Ministries

Group Cradle Roll 2

Edit Individual Group

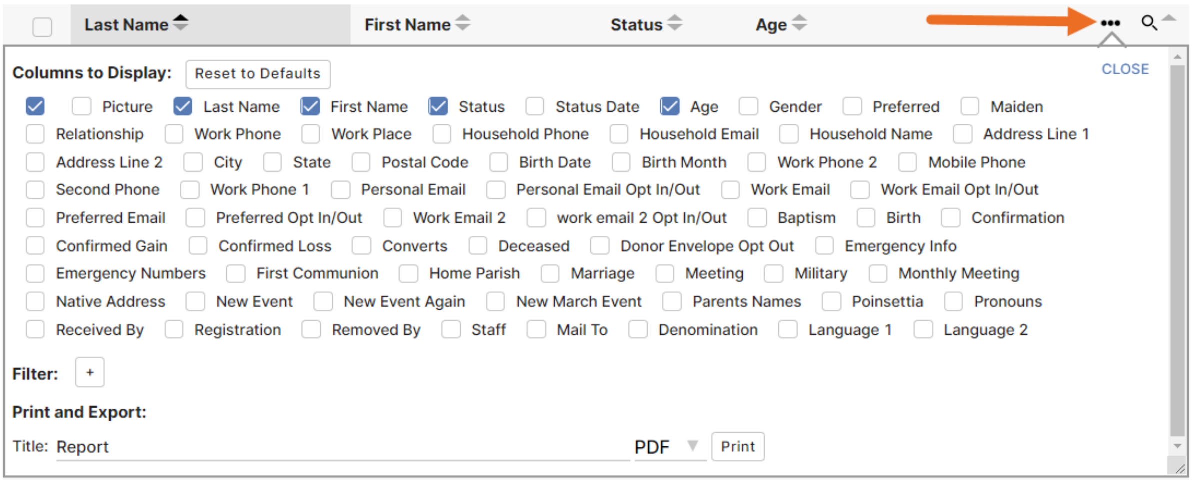
	Last Name	First Name	Status	Household Name
Search...				
☑	Abar	Anjeneya	Active	Anjeneya Abar
☑	Abramovic	Tychicia	Active	William & Liz Audette
☐	Addler	Ashley	Active	Cyd and David Addler
☑	Addler	Cyd	Active	Cyd and David Addler
☐	Addler	David	Active	Cyd and David Addler
☑	Addler	Murrae	Active NonMbr	Murrae Addler
☐	Addler	Sarah	Active	Cyd and David Addler
☑	Addler	Tyson	Active	Cyd and David Addler
☑	Ages	Shannon	Active	Shannon Ages
☑	Ages	Steven	Active	Shannon Ages
☑	Agler	Diane	Prospect	Donavan & Diane Agler
☐	Agler	Donavan	Prospect	Donavan & Diane Agler

Group Count: 8 Displayed: 1144

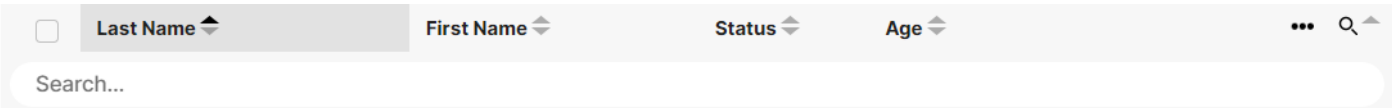
Remove All Add All Close

- You have the ability to sort and filter the individuals in the screen and choose what information to display.

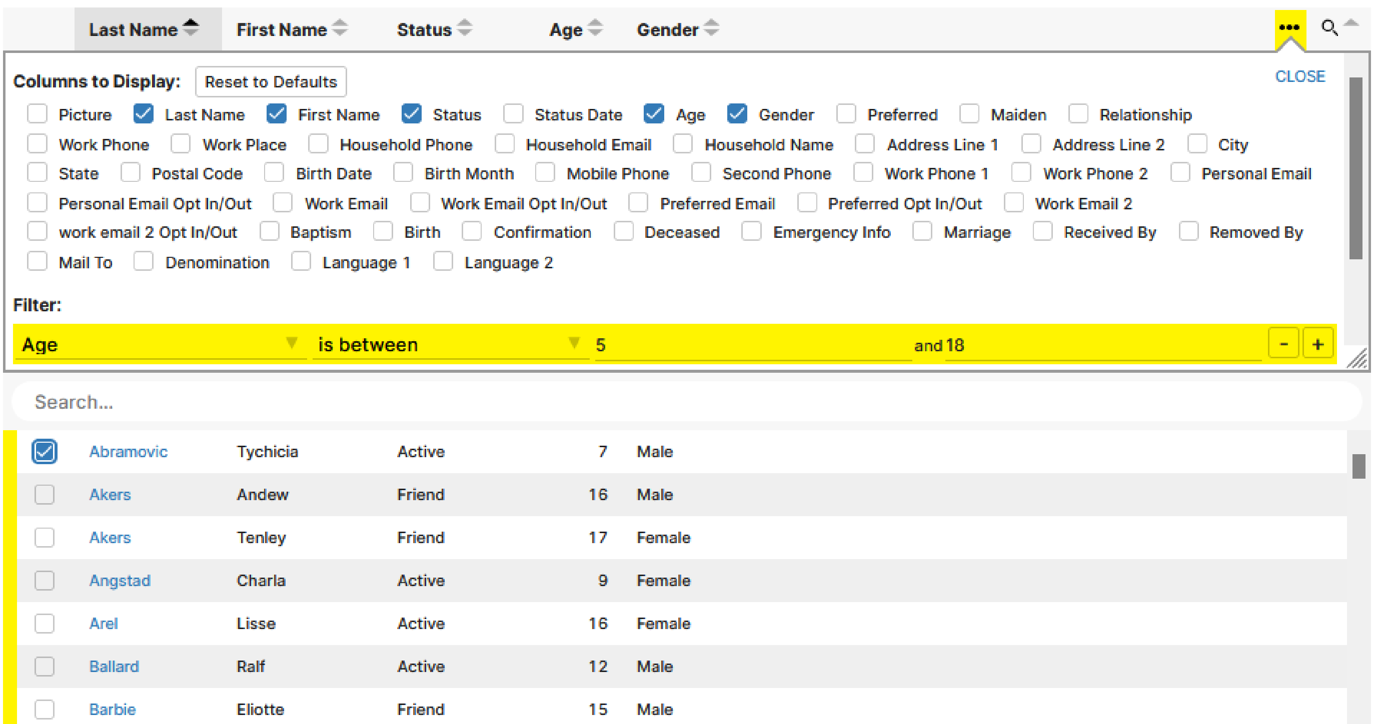
  1. To add additional column options, click on the 3 dot icon and check the items you wish to add.



  2. Use the up and down arrows by the column headers to sort/view by the individual columns.



  3. To add additional filter options:
     a. Click on '+' (plus/add) button next to 'Filter'.
     b. Select the criteria you wish to search by, such as age
     c. Add the specification of 'equal to', 'greater than', 'less than', 'is between', etc.,
     d. Type in the specific criteria, such as '5' and '18' seen in the example below.

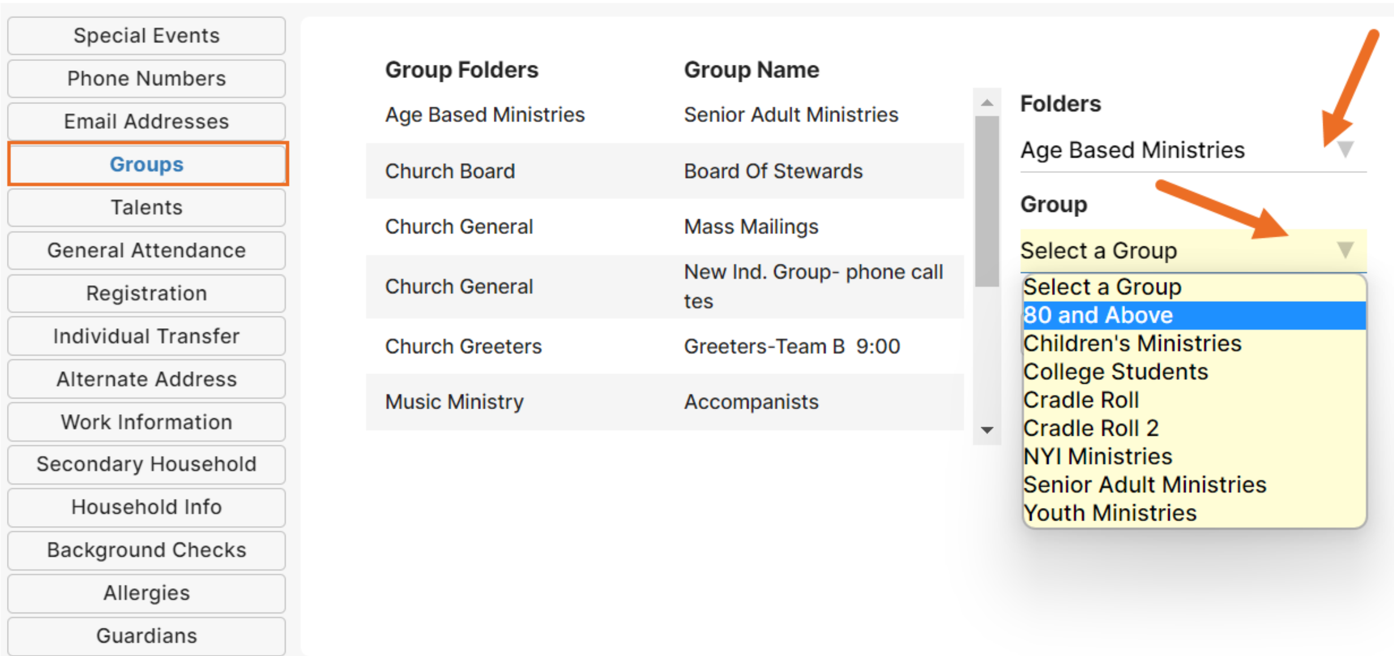


e. You can remove filters on a particular search by clicking on the '-' (minus/remove) button next to the filter you wish to remove.

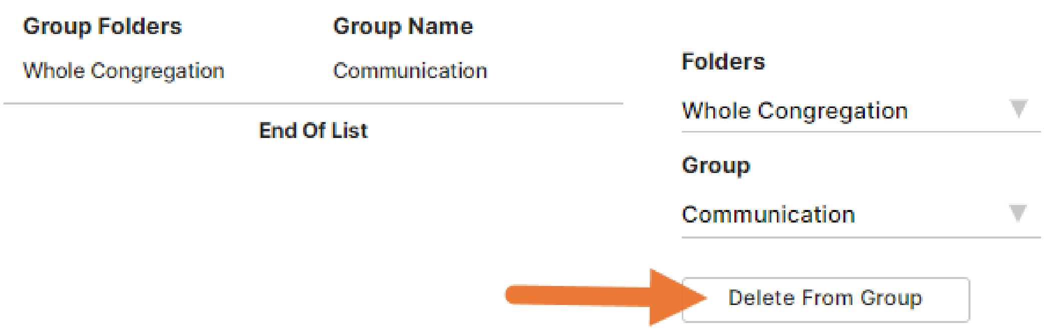
5. Once you have the filter the way you like, you can use the previously discussed 'Add All' button to do a mass add of individuals to the group based on the chosen criteria.

o From the individual's record:

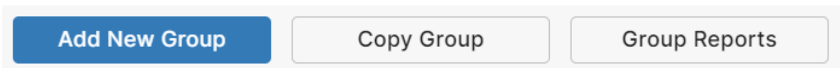
1. Go to People→ Individuals
2. Click on the last name of the individual.
3. Once the individual record is open, on the bottom half of the screen choose 'Groups' (as outlined below).
4. Pick the Folder and Group you want to add that individual to.
5. Click 'Add to Group'. Once you have added that individual to the group, it will appear in the central list in the middle.



6. You can also remove the individual from the group on this window, by clicking on 'Delete from Group' when the proper Folder and Group are selected.

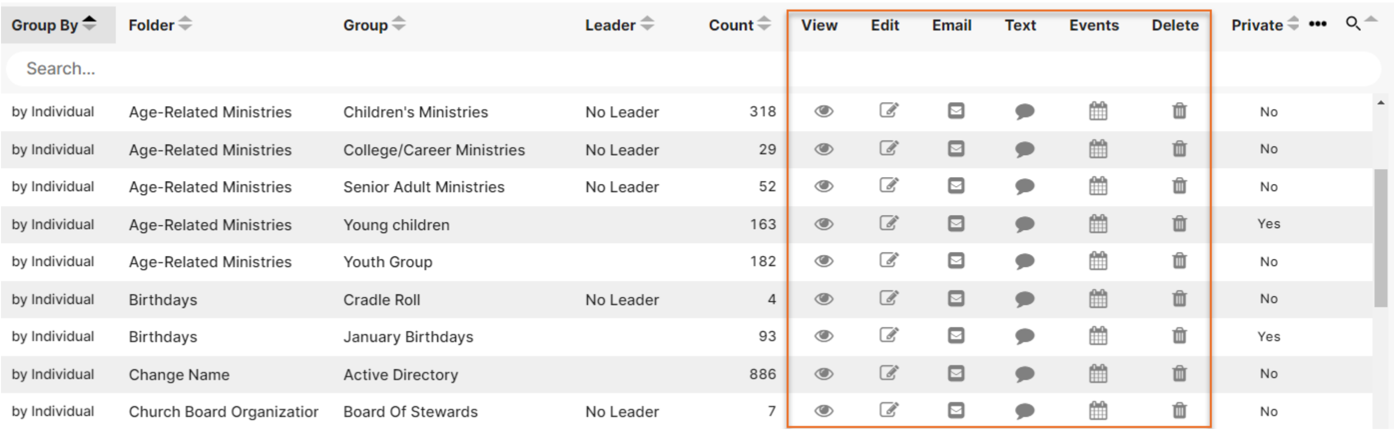


o Buttons – In the groups screen, there are 3 buttons at the top of the screen.



- **Add New Group** – Refer to the add a group section of this guide.
- **Copy Group** – Copy all of the individuals from one group into another group. This will not remove them from the original group, and it will add them **in addition** to the individuals already listed within the group you are copying to. Click 'Copy Assignments' and when it is completed “Copy Complete” will appear at the bottom of the screen. Click on 'Close' to return to the main group screen.
- **Group Reports** – Click here to access the list of reports, labels and exports available which pertain to groups.

o Additional Functions- All other functions that can be performed will appear in the Group List indicated by icons. Check the 3 dot icon to verify all functions are displayed in your view.



Group By	Folder	Group	Leader	Count	View	Edit	Email	Text	Events	Delete	Private
Search...											
by Individual	Age-Related Ministries	Children's Ministries	No Leader	318							No
by Individual	Age-Related Ministries	College/Career Ministries	No Leader	29							No
by Individual	Age-Related Ministries	Senior Adult Ministries	No Leader	52							No
by Individual	Age-Related Ministries	Young children		163							Yes
by Individual	Age-Related Ministries	Youth Group		182							No
by Individual	Birthdays	Cradle Roll	No Leader	4							No
by Individual	Birthdays	January Birthdays		93							Yes
by Individual	Change Name	Active Directory		886							No
by Individual	Church Board Organizatior	Board Of Stewards	No Leader	7							No

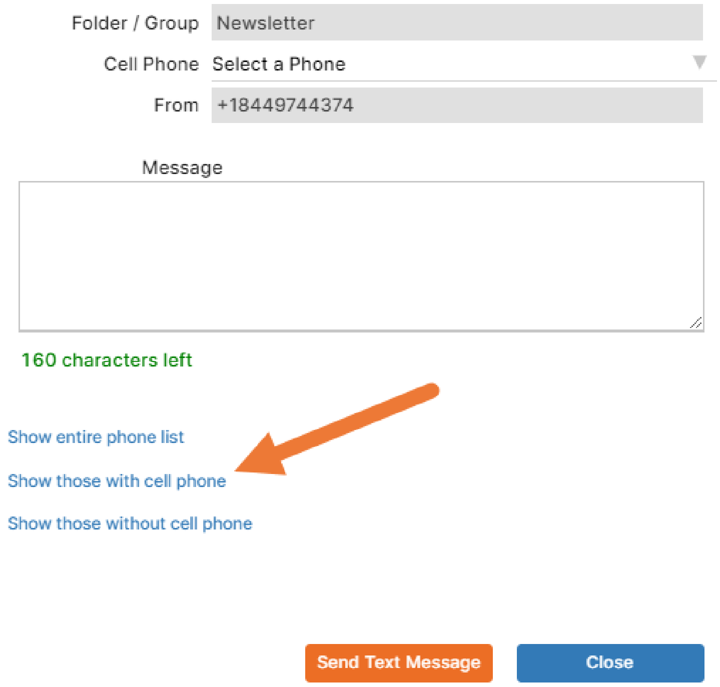
- View – Click on the eye icon for any group to open the group. Here you can view and search group members, quickly remove members, or create custom group reports using the filters.
- Edit – Single click on any folder or group name to edit the name, or use the edit icon to add or remove group members. You can also create custom group reports using the filters.
- Email – Clicking on the envelope icon will open another window and allow you to draft an email and add attachments to send to all members of the group. For more information on emailing in IconCMO, visit the text and email groups section of this guide.
- Text – Send a text message to an individual group (not available in household groups.) Clicking on the message icon in the Text column will open a screen to compose a text message. For more information on text messaging in IconCMO, visit the text and email groups section of this guide.
- Events – Set up and track attendance for group events. Click on the calendar icon in the Events column for any group. Choose Add a New Event, type the name of the event, choose a date and frequency and click add. To edit an existing event, choose that event date from the Event List dropdown box.
- Delete – Click here to delete the group and its history including group events.

Text and Email Groups

o Group Texting- Texts cannot be sent to Household Groups, since households do not have mobile phones, individuals due.

- To receive text messages, the recipient’s phone number must be recognized as a cell phone in the system.

- The links at the bottom of the texting page (shown with an arrow below) will print PDF reports. ‘Show Entire Phone List’ should show all individuals within the group selected, and list cell phone numbers along with carriers if any have been entered.



- Text message character limit is 160 for most carriers, 140 for Sprint users.

- There are 2 kinds of texts that can be sent from IconCMO, email-to-text and regular SMS text.

1. With **email-to-text**, the carrier must be listed in IconCMO for each individual.
    a. If you are unsure which individuals have or do not have a cell phone carrier listed, you can use the links on the bottom of the texting screen to pull a report.
    b. To assign a carrier, go to People→ Individuals, select an individual and click ‘Phone Numbers’. Select the phone type cell phone and add the carrier. If you do not know the carrier, type their number into www.FreeCarrierLookup.com and it will tell you which carrier they use.
    c. Reporting available under People→ Groups→ Group Reports→ Email Status Report. This report will show the status of group email-to-text messages in addition to the group emails.

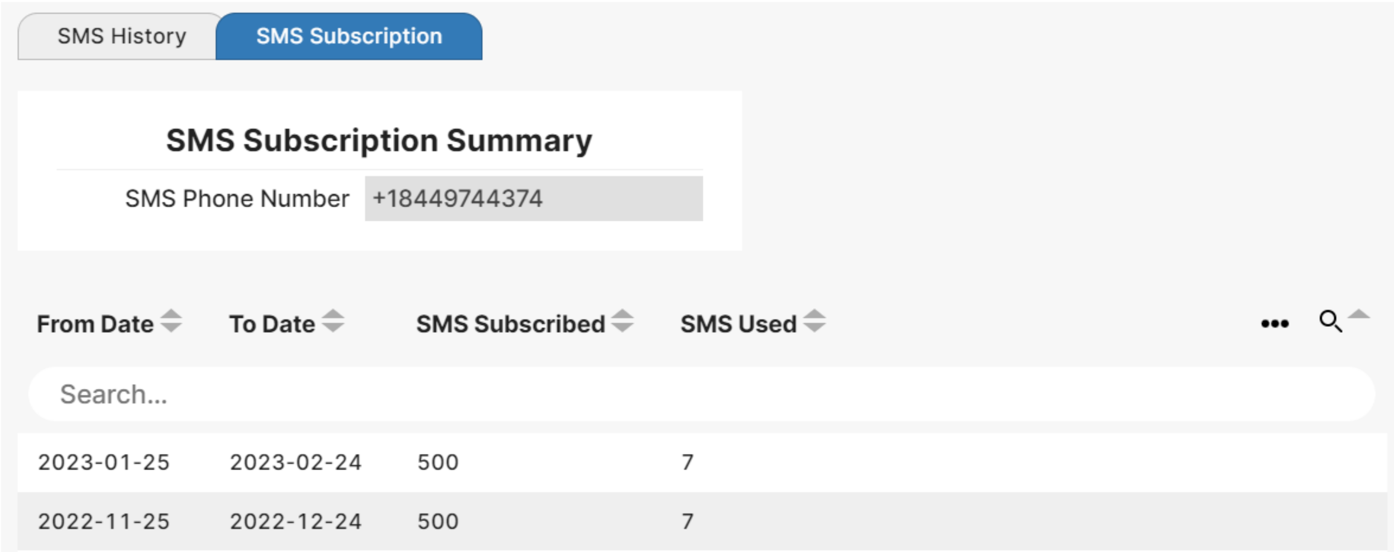
Email Status Report

Date Sent: May 12th, 2023 08:20:23
Sender: "Icon Systems Inc." <support@iconcmo.com>
Subject: Newsletter
Group: Youth Ministries: Age Based Ministries
Email To: Use Preferred Emails

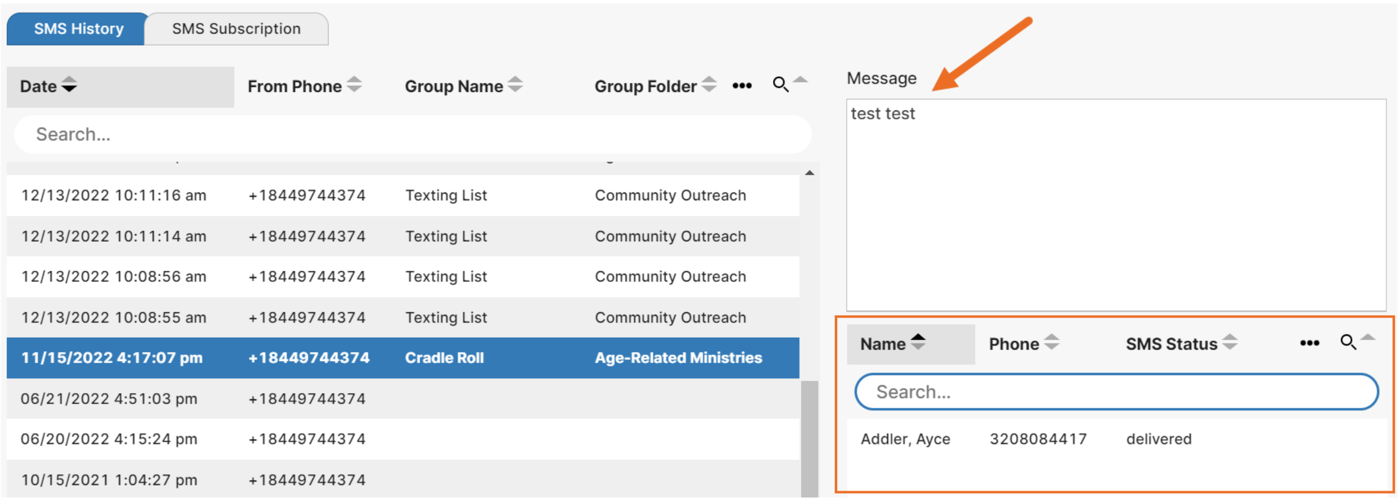
Name	Email Address	Sent	Status
Rollins, Maranda	maranda@iconcmo.com	Yes	Message Sent to Queue
Sender	support@iconcmo.com	Yes	Message Sent to Queue

2 emails sent.

2. With **regular SMS text** you can send texts without knowing the carrier.
    a. You will be assigned a phone number from which the texts will be sent.
    b. SMS texting is subscription based. Pricing is available here.
    c. Users have the ability to unsubscribe and resubscribe to texts by sending "stop" or "start" to the phone number you have been assigned.
    d. Reporting is available under System→ System Utilities: SMS Messages
        i. SMS Subscription – Here you can see your assigned phone number, subscription period, the number of texts used and the number you've subscribed for.



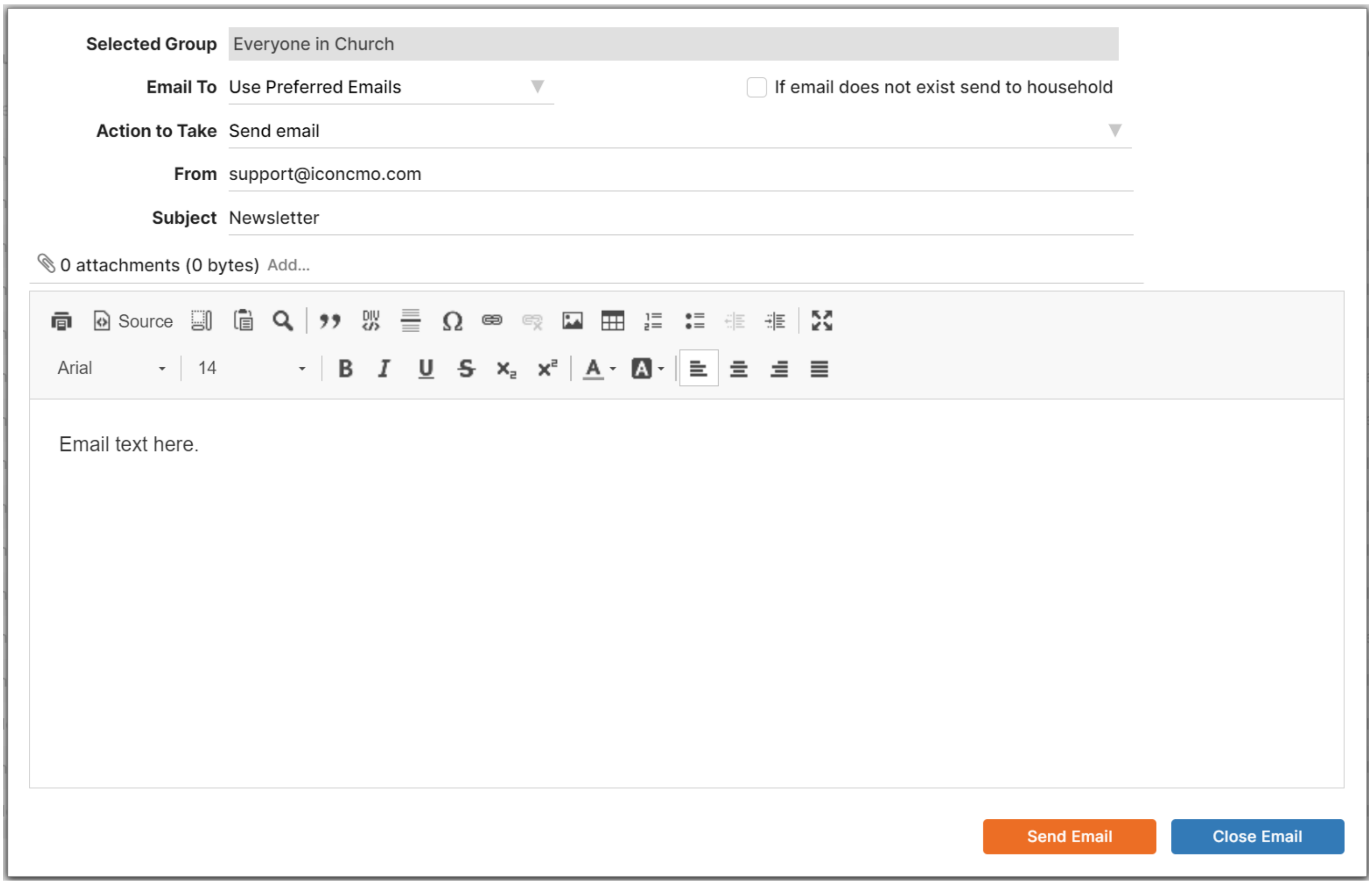
        ii. SMS History – Here you can see the history of your group texts including who sent them, when they were sent, and who they sent them to. You can even see the content of the message as shown by the red arrow and the status of each individual text as indicated in the red box.



Note: If you wish to add the regular text (SMS) option to your subscription, contact support@iconcmo.com. If you do not subscribe, you will automatically have the ability to use the email-to-text option. The 2 kinds of text messaging available in IconCMO can only be used independently and not in conjunction with one another.

o Group Emailing

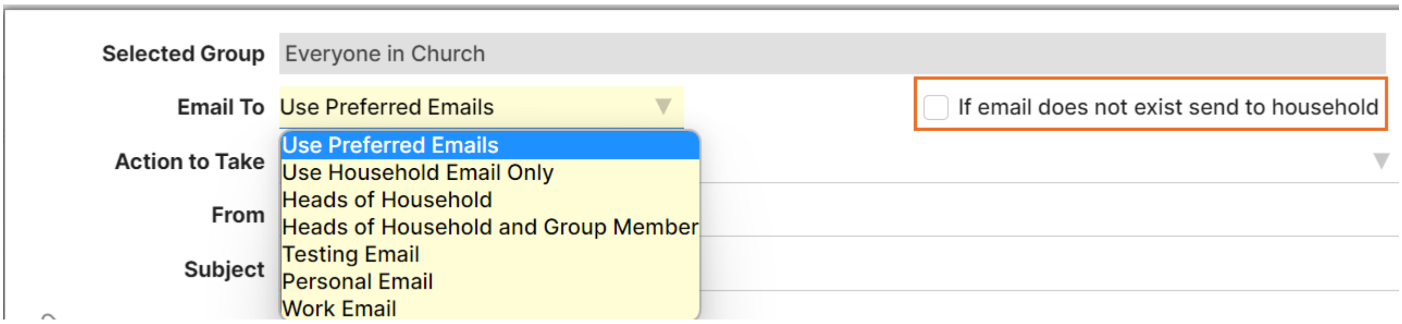
- To send group members an email, click the Email icon on the Groups window. This will open another window and allow you to draft the email and add attachments.



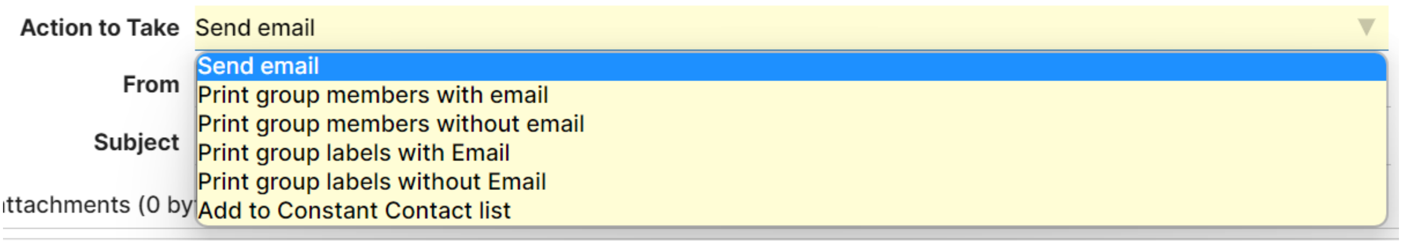
- You can send multiple attachments, however the maximum file size for attachments is 15 MB.

- You can choose which email type you want to send to, including household emails if it's an individual group you are emailing, or even heads of households if it is a children's group.

- 'Heads of household and group member' is a great option for teenage groups. There is a checkbox on the screen for whichever option you choose to send to the household email if the initial option doesn't exist in any individual's record.



- From this screen, there are additional options for printing lists and labels, or adding individuals to groups and adding new group lists in your Constant Contact email account if you have one set up.



How to Set Up Automatic Emails for Anniversaries and Birthdays

o Automated emails can be set up to go out when individuals have anniversaries or birthdays.

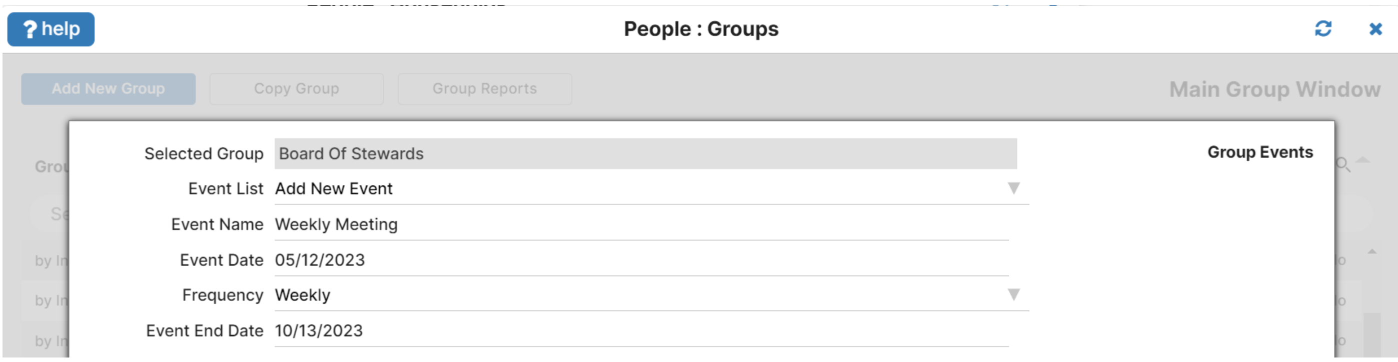
1. Go to People→ Communications.
2. Check one or both boxes depending on what type of emails you want to go out.
3. When the boxes are checked, each morning at 9am EST people with birthdays and/or anniversaries entered into Icon will receive celebration emails. The individual must have an email entered into the system.
4. The email will format as shown below:

- Happy Birthday/Anniversary, {name and possibly spouse name}, from all of us at {church name}!

Create Group Events

This feature allows you to track attendance for a specific group.

1. You must first select the group on the groups screen.
2. Click on the calendar icon under the Events column. This will open a new screen.
3. Choose 'Add New Event' from the Event List dropdown menu.
4. You will then have other fields to complete, Event Name, Event Date and Frequency.
5. If it is a one time event, choose Do Not Repeat.



6.

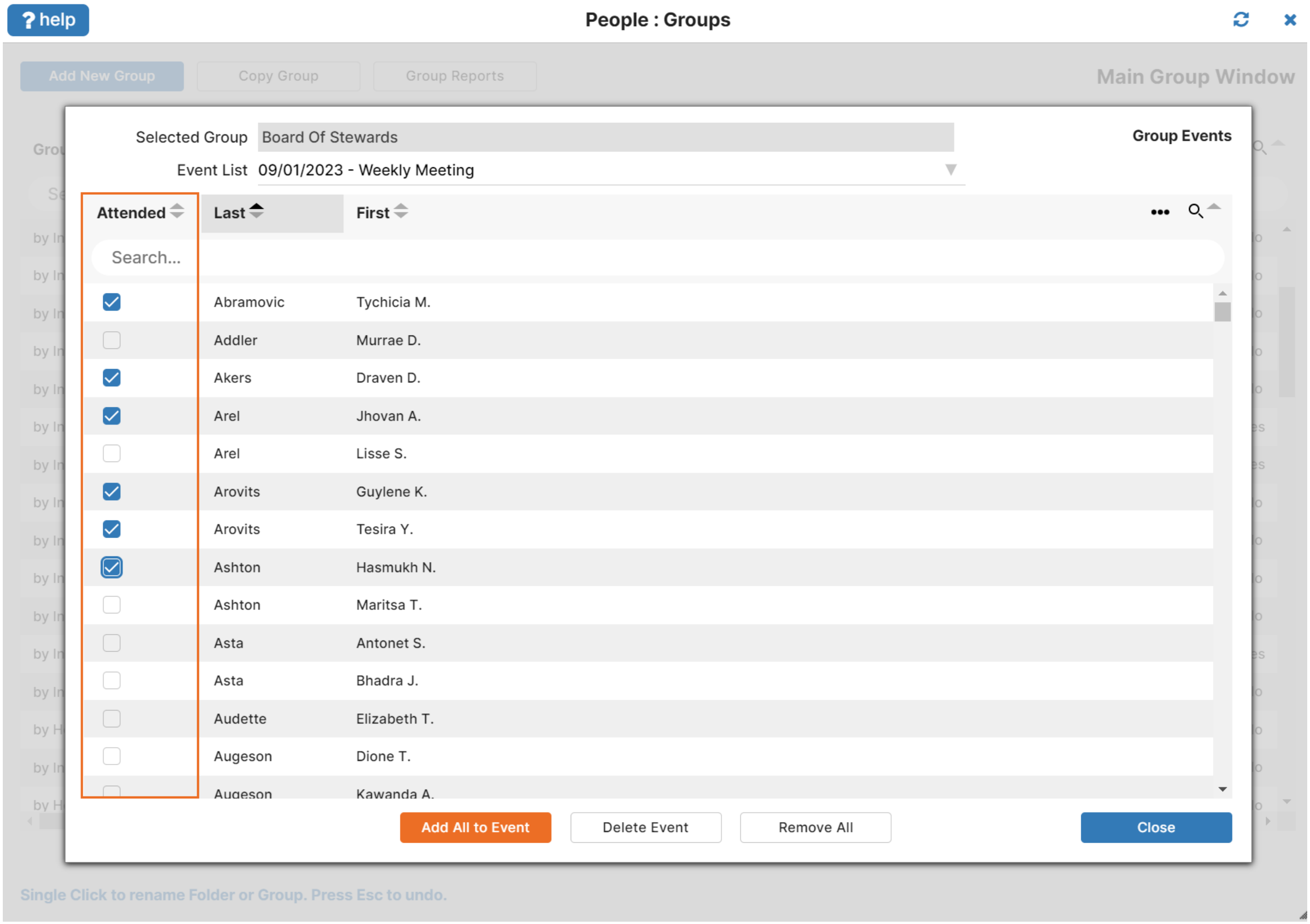
7. If this is a recurring event, select the frequency of how often the event occurs, and a new field will populate to select an Event end date.
8. When finished, click 'Add'.
9. You can then add more events, or click close if you are done.

Note: Once created, events cannot be edited, they can only be deleted. Deleting the events is done by choosing the particular event out of the Event List dropdown menu and clicking delete at the bottom of the screen.

<u>Taking Attendance for Group Events</u>

Once you have a Group Event added, you can track the attendance of those group members.

1. Click on the calendar icon in the Groups screen next to your specific group.
2. Select the event you want to track attendance for from the 'Event List' dropdown menu. This will populate the list of members in that group.
3. Click the boxes next to the group members who were in attendance. Clicking the box immediately saves your selection.



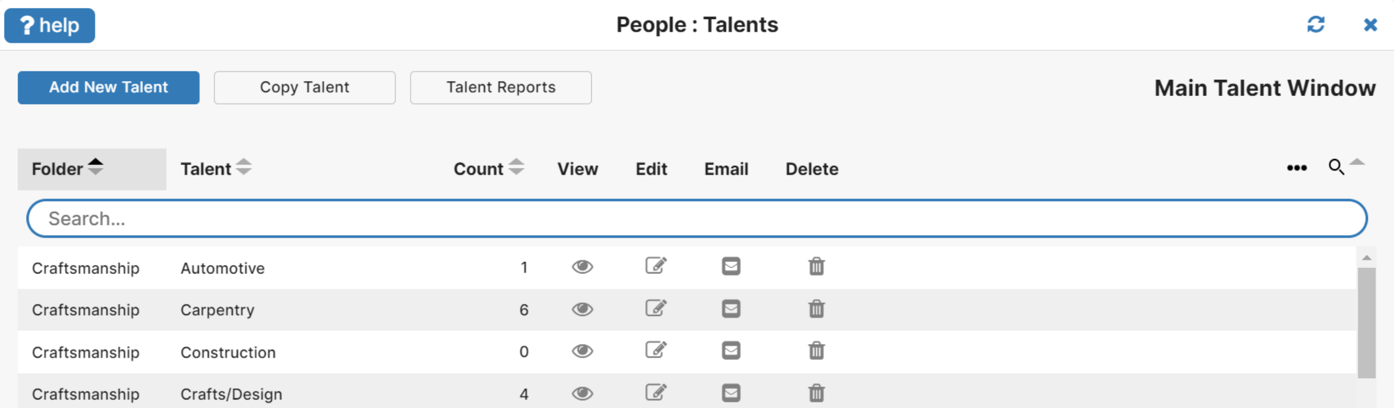
4. The 'Add All to Event' or 'Remove All' options will add or remove all individuals in the list displayed to the event selected. This is helpful when you know the majority of the individuals have attended- you can use the 'Add All' and then uncheck the few that didn't come, to save time.
5. When finished, click 'Close'.

Add Talents and Assign them to Individuals

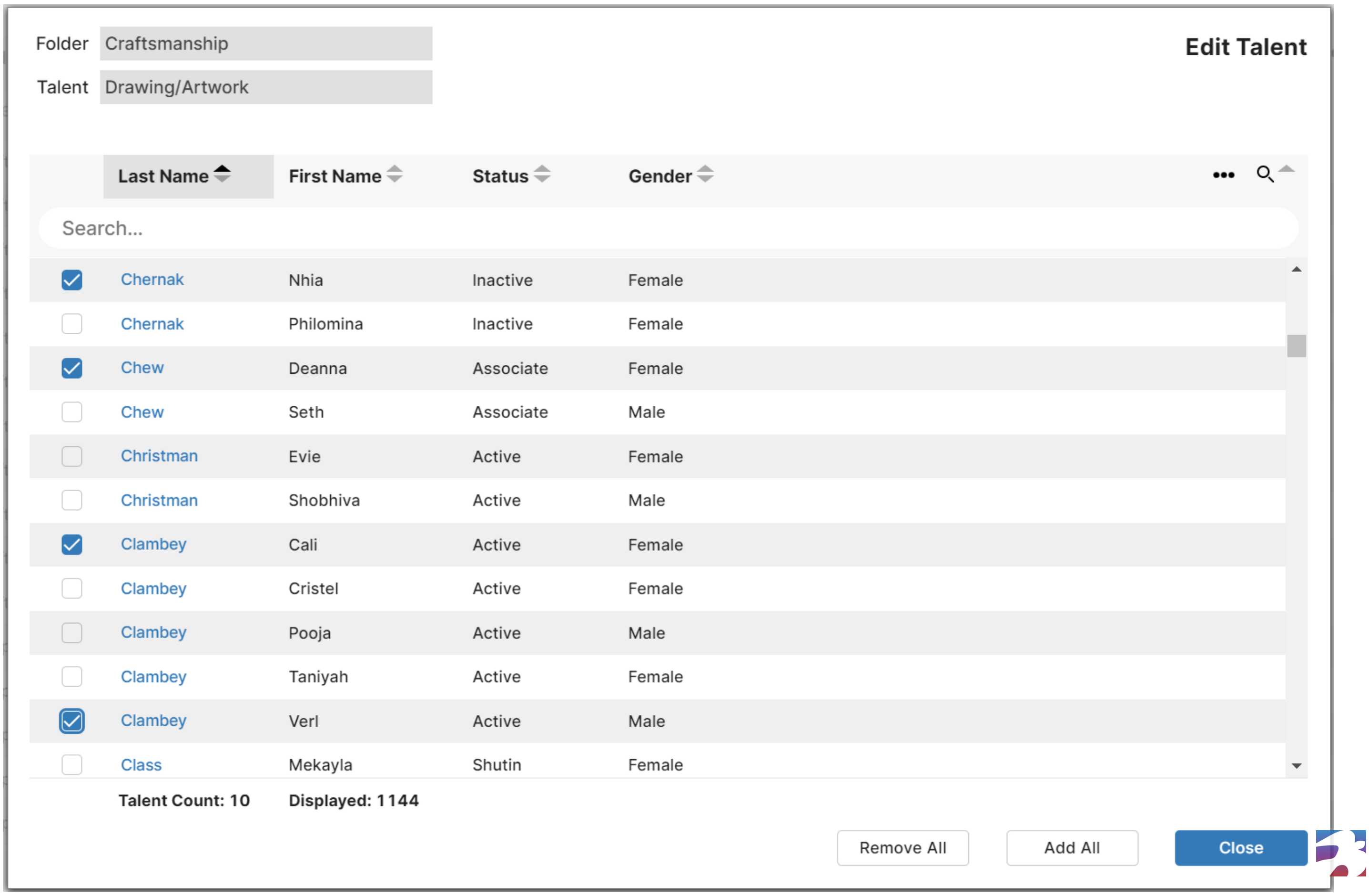
Talent can be assigned in one of 2 ways.

o From the Talents window:

1. Go to People→ Talents.
2. Click 'Add New Talent' in the top left corner.

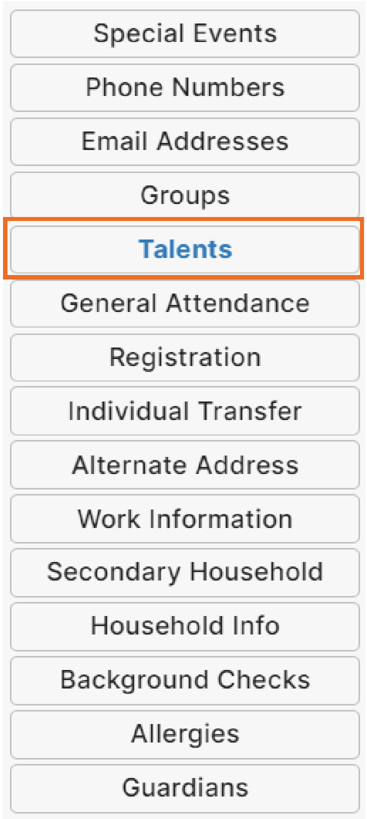


3. The window will focus on a new row. To edit any folders or talents overwrite the text to type the Folder name and Talent name. The information will be saved automatically.
4. To add/remove individuals in a talent, click on the Edit icon. This will open a listing of all individuals.
5. Check or uncheck the box to the left of the name to add or remove them from the talent.
6. You can also use the 'Add All' or 'Remove All' options at the bottom of the window to add or remove people in bulk.

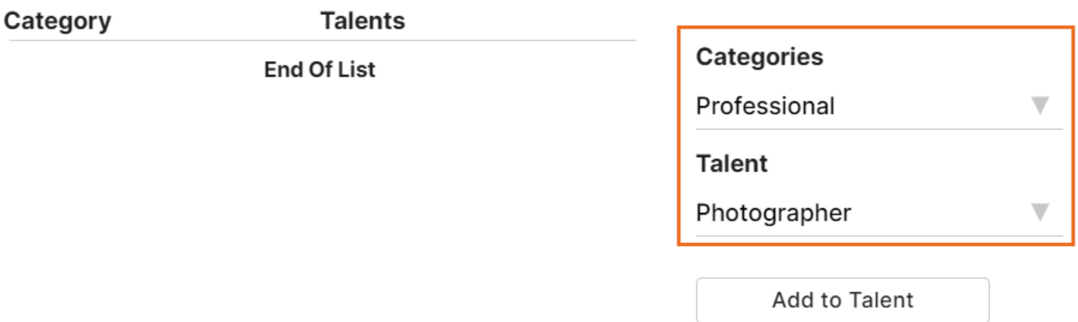


o From the Individual's record:

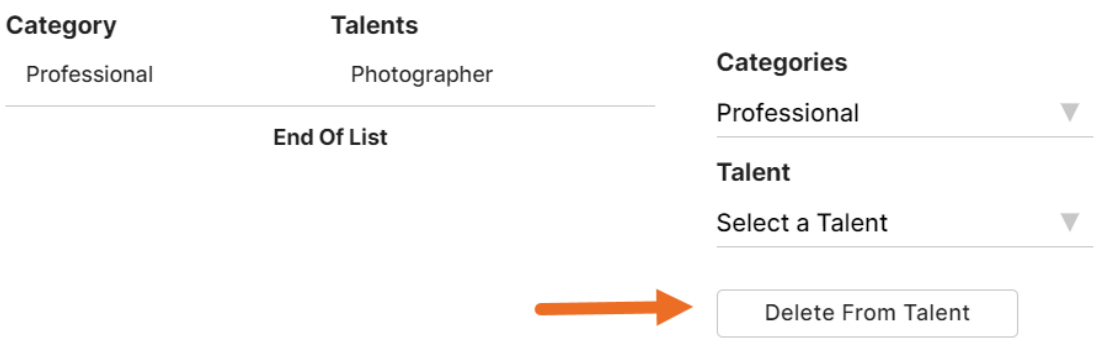
1. Go to People→ Individuals
2. Click on the last name of the individual.
3. Once the individual record is open, on the bottom half of the screen choose 'Talents' (as outlined below).



4. Pick the Category folder and Talent group you want to add that individual to.
5. Click 'Add to Talent'. Once you have added that individual to the talent, it will appear in the central list in the middle.



6. You can also remove the talent from the individual on this window, by clicking on 'Delete from Talent' when the proper Category folder and Talent group are selected.



o Buttons – In the talents screen, there are 3 buttons at the top of the screen.

- **Add New Talent** – Refer to the add a talent section of this guide.
- **Copy Talent** – Copy all of the individuals from one talent into another talent. This will not remove them from the original talent, and it will add them **in addition** to the individuals already listed within the talent group you are copying to. Click 'Copy Talents and choose the From and To information.
- " will appear at the bottom of the screen. Click on 'Close' to return to the main group screen.
- **Talent Reports** – Click here to access the list of reports, labels and exports available which pertain to talents.

o Email Talent – You can email the individuals in a talent by clicking the email Icon. This brings up a new window where you can compose and send your email.