

## What's the People Module? MTL training

This is the hub of where every other module feeds from... if a person is not listed in People, they are not listed in Groups.

### Menu bar tabs: Dashboards, Lists, Workflows, Forms, People

- Dashboards is based off of reports of things (you can play with this, but we've not done much with this tab yet) Overview, Metrics, Profile Notes- Not using

- Lists:

What is it? List is a report based on common information from a specific group of people (different than your ministry group) based on certain criteria

Create a list based from a request:

ex: summer blast needs more volunteers, check this on the connection card, information gets put in PCO and a list can be created to find those people who are interested.

Patty has already created automatic lists for ministry team interests that team leaders would get contacted when a new person is added

#### NEW LIST

Add a rule (list of people with crossroads email) save

Add rule Include module (people)

Add condition (personal)

Add condition (email) is (crossroadsefc.com)

Submit

Find list (create list) \*only staff has permissions to do this, if you feel you need to have access to this, please contact Patty.

- Send email
- Send church center announcement (this is a push notification)
- Send text message (only 3 people have this permission)

*Side note:* Registrations for events create their own list already

*Side note #2:* Admins can also create a Bulk actions- this is useful when there are a lot of people that we need to do the same action to, such as moving them into a group

- Workflows: is a checklist that is managed manually when each step is completed  
Ex: Membership Interest/Application has 10-12 step process (some is automated some is not), but once each step is completed, Patty can check it and it will send the next step to the required person part of that workflow  
(Rachel and Rich will train separate with Patty)

- Forms: take the place of needs list. Most will be made for Registrations (Patty)

- PEOPLE- where you find the people and their contact information (if you have not updated your profile, now would be a good time to do that)
  - o The people module is NOT the directory. The directory is specific to Church Center App (you can update your contact info in there as well)
  - o To send an email to a specific person
    - Go to profile
    - Click on email
    - Find template you need (ex: membership application) or no template and you type your own content
  - o Is there a type of email template you use often that we should add to this list?
- See household, directory status (right side of screen)
- (left side of screen) activity, communication, workflows, notes, forms,