



RDS Advantage Tutorial

Contact Management

CONTACT MANAGEMENT-MC103

The Contact Management applications provide capabilities to track unlimited initial and subsequent contacts, visitations and follow-up for hospital, outreach, ministry and financial drive contacts, communication and reporting, for ministering to the congregation. A contact entered for any member, visitor, guest, etc. can be used to print labels, visitation cards, postcards, etc. Click on Help for details and suggestions regarding contacts.

Each contact record is entered separately but can also be entered for an Individual ID of "A0" for a couple. For visitors and guests, contacts can be added at the same time the individual is entered into the database through Quick Entry-MR100, by turning on the "Contacts" icon on the top toolbar.

Additional information for Outreach and Evangelism can be found by clicking on the "Help" icon, choosing Index, and typing "Outreach". You can display and print this helpful information with ideas on how to make the best use of the system for your outreach ministry.

Features:

- Track an unlimited number of contacts for each individual and for each couple.
- Record the type of contact, with an unlimited number of user-definable types.
- Relate a contact to any Activity, such as outreach, a Sunday school class, finance group, deacons, etc.
- Record the person who made the contact. Individuals making contacts can be selected from a lookup.
- Relate a contact to an unlimited number of user-defined contact teams.
- Record the date of contact and optionally enter a next contact date.
- Enter free form text about the contact.

- The system keeps track of and reports the number of contacts made to each person and couple.

Reporting:

- Almost unlimited types of reports can be produced based upon contact entries.
- Select those for reports by ranges of family number, name, birth year, tract number, zip code, number of contacts, type of contacts, contact team, date of last contact, date of next contact, by activities and activity sub-types.
- Select by individual types and sub-types.
- Choose up to eight different addresses, phone numbers and/or e-mail addresses.
- Choose to print in output order of eight different criteria.
- Group by individuals or families.
- Choose to print comments for any number of contacts.
- Choose to print names of children and/or spouses.
- Choose to include addresses, work phones or both.
- Choose to use preferred names or formal names with initial.

- Report selections can be saved and given user-described names for future use.
- Reports can be printed to any printer device, printed to a file, or exported in any popular file format.

- Contact information can be used to print address labels, name tags, address postcards, and to print visitation cards.

Visitation Cards:

- Using the same selection criteria above, visitation cards can be printed.
- Visitation cards include the name, address, and phone information about the individual/family, children and ages, and includes the notes made from the previous contact. The contact team, activity and tract are shown.
- Cards include the form of contact: personal, phone, letter or e-mail.
- Cards include the date of the contact and a date for the next contact.
- Space is provided on the contact card for notes to be written about the recent contact. This information is then entered into Contact Management as a follow-up contact.

Security: - Access for this application can be given or withheld, including mode of access, for each user.

An Exercise: Adding Contact Management

Exercise 1. Enter a contact for the current month, 5th day and current year for the Robert Hughes family as a couple. Use contact type of PAST for Pastor Visit from Rev. Joe Bruno (18-A1) and enter a Next Contact Date of 12th day in the same month and enter comments that would relate to the visit.

Exercise 2. Enter a Missions contact for Scotty and Sarah Harrison as a couple (16-A0). This contact would be a follow-up visit made by Bill Youre (40-A1) of the Evangelism committee-AC100 on Tuesday of the current week. Use a Next Contact Date of a week later.

- Select Contacts from the Applications Menu.
- From the Maintenance Menu, select Contacts.
- Select Add Mode.
- Enter the Family Number and Individual ID or type the beginning letter of the last name and click on the Lookup icon for selection. (For couples, you may want to select the A0 record.)
- Enter the Contact Date.
- Select or type the Contact Type. Additional Contact Types can be set up in Control Codes-CS101.
- Enter the Activity ID or click on the Lookup icon if the contact was made on behalf of an activity. If not, press <ENTER>.
- Type who made the contact or use the Lookup.
- Enter the team, if used.

Example of selection window for Contact Reports

PRINTING VISITATION CARDS-MR306

Visitation cards are very useful because they contain most of the pertinent information about the family as well as space to add contact date, contact name, next contact date and remarks. You can enter the next contact for these families from the visitation cards. They should be printed on 4 X 6 cards.

Exercise-Printing Visitation Cards

Print visitation cards for the pastor to use when he makes follows up on the contacts made for the week.

- Print in order by Next Contact Date. You can return through all the fields except Next Date. Here you need to enter the range of dates for the beginning Next Date and ending Next Date for that period. It is not necessary to enter selections in each field.
- Click on the Print menu.
- Select Visit Cards.
- Select Output Order of Next Contact Date and press <ENTER>.
- Check to list children.
- Enter the Beginning and Ending Fields. Most of these will not be necessary. Usually only one or two depending on what type of cards you are selecting.
- For this exercise, enter a range of dates that includes your Next Contact Dates. (Another example might be: Cards for last Sunday's visitors. You would select Beginning and Ending Contact Type as WORS for worship service and Beginning and Ending Last Date i.e. last Sunday's date.) Press <ENTER> through any unneeded fields or press the Page Down key.

- Select Individual Type, i.e., V for visitor or P for Prospect and Sub-types or press <ENTER> for all.
- Comments from the last number of contacts? Usually 1-5.
- Check to print extra comments (overflow) on another card.
- Select Preferred or Formal Name and Initial.
- Click address selection (Usually Both).
- Select card type.
- Click on Print.
- Press <ESC> and then Exit to the Print Menu when finished.