



# Staff Guide

for

## RDS Connect<sup>®</sup>

# Unite<sup>®</sup> App

### **Benefits of your database integrated in real time with your Unite App:**

*Organizations need integrated software to enhance their ministries. Disconnected databases cause bottlenecks and data inconsistencies. The Unite App makes it easy for leaders, staff and members to access and update information.*

*Integrated data keeps information up to date. One input propagates across all systems, keeping your data current. Your data is real-time because your database and the Unite App are one.*

# RDS Unite® Brings Members and Staff Together



Unite® is for organizations using RDS Connect, Cloud-hosted systems



## BRIEF OVERVIEW

RDS Connect **Unite**® APP is a series of features that allow members to access the database and more easily communicate with each other. With the convenience of tablets and smartphones members have access to information of interest to them, can communicate with other members, update family information, make contributions and payments, upload family photo, see the directory, see maps and directions to residences, and more.

Cloud-hosted for Apple and Android devices

- Unite members with the RDS database for instant access in real time
- Strengthen the community of believers

Your organization can setup

- An image (logo) to display on the RDS Unite screens.
- A link to a site like Vanco or Paypal so users can go directly to Internet sites and pay fees.
- A link to more information about an activity or event.

With fully integrated capabilities, using cell phones and/or tablets, members can:

- **Access Family and Individual Information** - See and update information about family info, and add family photo
- **Make Contributions** - Make gifts and pay fees
- **See Personal Contributions**
- **Look at the Directory** - See photo directory. Send e-mail, make phone calls or text messages
- **Map** - See a map of someone's address and see directions to that address
- **Enroll** - Enroll in activities. When you enroll if there are fees for the event you can pay at that time. Leaders of activities are notified of new enrollees.

**CAUTION: Before making Unite available to members, check your database of members for accuracy of entries. Errors in the database will show up as errors when using Unite. Use the selection options in RDS to determine who will be listed in the App, and what information.**

The ONLY cell phone numbers and e-mail addresses displayed in the Detail of the Directory are those with Control Codes of CELL and EMAL.

## **BRIEF OVERVIEW**

Each organization controls who is included in the Unite App, and what information is included about each family by using the following:

### **CS116:**

- Determine the range of family numbers and names to include
- Check box to un-list ALL families and organizations in a directory (no directory used)
- Determine range of zip codes to include
- Determine Individual Type and Sub-Types to include
- Determine Joined Dates to include
- Check box to modify Family/Organization to display Last name, A1 First name, A2 First name in Directory.  
**Note:** This is important for searches for spouses by first name in Unite. RDS recommends checking this box.
- Check box to use Ampersand (&), “and,” or comma between A1 and A2 names
- Choose to use First Name or Preferred Name.
- Check box to include Middle Initial

### **MR101:**

- A check box to un-list families and organizations in the Unite App.

### **MR107:**

- A check box to un-list e-mail or phone numbers

### **MR199:** (under “RDS Unite App” tab)

- Check box to add new family in the Unite Directory
- Assign “No Email” to children so they display in the Directory even if they do not have an e-mail address.
- Determine “Edit,” “View,” or “Unlisted” for members to choose for Birthdate, Baptism Date, marital Status, and Marital Date. **Caution:** If using “Edit,” members can delete this information from the database.

### **AC101:**

- A check box to un-list Activity from RDS Unite.
- A ‘Meeting Dates Description’
- A ‘Social Media URL’
- Under “Fee” tab, a ‘Revenue Code’, ‘Fee Amount’, and ‘Fee Comment’.
- Enroll member as a ‘Leader’ and their EMAL and CELL will be available in RDS Unite for contacting.

## Getting Started

- Download the RDS UNITE app from your Android play store or Apple app store depending on the mobile device you own. Once downloaded, open the app and enter the organization code. Contact RDS for this info. You must already be included in the database with your name and e-mail Address for the registration process to be successful. Your organization's logo should appear at the top.
 

- Now tap on "register here" and enter your e-mail address on file with the organization and set a password then tap "Register". This will sign you into the app and send yourself a registration email that will need to be confirmed. You will be able to log into the app but will not have full access to the entire app until you confirm the registration email. **Important: Please check spam folder for confirmation email if not received in your inbox in a timely manner.**
- Now you're ready to log in, open the app and select "remember me" to save your credentials. Now enter your email address and password then touch "Sign In".



<-This icon found middle/right of the app is a globally recognized sign for menu, tap this to select your menu options.

### Church Code

### Sign In

### Directory

### Menu

Date	Purpose	Amount
03/22/2016	2016 Operating Offerings	\$800
03/22/2016	2016 Operating Offerings	\$70

Once confirmed you can access: Directory, My Family, My Activities, Contributions and My Account.

There are three areas under My Family: Family Primary Address, Personal Information, and Personal Contact Information.

**Family Primary Address:** Lists residential address and phone number.

**Personal Information:** Displays name and dates. You can enter or change dates, marital status, and gender.

**Personal Contact Information:** Displays Cell phone and Email address. These can be changed or entered. Check the box beside each one to allow them to be displayed in the directory.

### **Family Controls in Unite App**

Families can determine if their Personal Information will display Birthdate, Baptist Date, Marital Status or Marital Date will be displayed in the Directory.

Families can determine if their Phone Number or Email Address will be listed or un-listed in the

**After changing or entering information, click on the “Save Changes” button to save your entries.**

## Directory:

Select "Directory" to see the directory of members.

Enter a name to search, or select a letter of the visible alphabet to see everyone with the same beginning letter of their last name. Can use an asterisk (\*) as a wildcard in searches.

Click on "Details" to see more communication options for the individual displayed.

Each family's name, photograph, telephone number and e-mail address will be displayed. \*\*\*Staff: For phone numbers and email addresses to show up for each person in the directory, the control code EMAL (email addresses) and CELL (phone numbers) must be entered. Change these globally in CS101/Control Code Maintenance\*\*\*

Click on the phone number to place a call or text the person.

Click on the e-mail address to send e-mail.

Click on "Map Address" to see a map of the person's address.

Click on "Directions" to see driving directions to a person's residence.

Click on "Personal Contact Information" then their e-mail address to send an e-mail message.

**Privacy:** If you do not want your address or phone number listed in the directory go to the My Family tab and touch "listed or unlisted" under each item until desired selection is accomplished. If deceased persons are listed in the database as Member Status X (deceased) they will not be displayed in the Unite app Directory.



## Family Photo:

If your family photo is not displayed you may upload it. While in "My Family" Click on "Family Photo" and select the source and photo you wish displayed. There are several ways to select photos, depending upon the device you use. "Camera," "Gallery" and "Photos" are usual options.

To install a photo, you must have the photo you want already in your device in one of these places. After you select the photo and it is displayed, click on the blue "up arrow" (see at left) to upload the photo into the database.



## See Your Giving Records:

To see a record of your payments and/or pledges, click on "Contributions."

## Make Contributions and Payments:

If the organization is using Vanco Services or other electronic services, click on "Contributions, then "Make Contributions" to make new contributions, either one time or recurring. Other credit card processors can be used but will not be integrated with the RDS accounting system.

Note: The **Unite**® App is provided for you with no cost. We believe these features are so important for organizations we want all members to have Unite.

# How RDS Connect relates to RDS Unite



**Member, Jim & Jane**

Phone: 🏠 (405) 222-3333

Email: [jm@cox.net](mailto:jm@cox.net)

Address:  
1544 Anystreet  
Anycity, OK 73034 U.S.A.

[Details](#)

MR101 - Member Records - Family / Organization Maintenance

Main | Family Info | Individual Info | Advisories | Email/Cell | Photos

Organization Act ID:

Family/Org #: 57 ...

Family/Org Name: Member, Jim & Jane ...

Num of Children: 1  Family Unlisted in RDS Ur

Unlisted?

Permanent 1544 Anystreet

City: Anycity ...

Zip: 73034 ... Carrier

Country: U.S.A.

Phone: (405) 222-3333  Phone Unlist

This will be the A1's EMAL e-mail address

MR101 - Member Records - Family / Organization Maintenance

Main | Family Info | Individual Info | Advisories | Email/Cell | Photos | Activities | Attendance | Gifts | Notes | Contacts | Guardians | Volunteer Qualifications

Organization Act ID:

Family/Org #: 57 ... Individual ID: A1 ...

Family/Org Name: Member, Jim & Jane Individual Name: MEMBER,JIM

Num of Children: 2 Family Unlisted in RDS Unite App Linked to: A/P: 0 A/R:

Delete	Add/Edit	Code & Description	Email	Address	Phone Ext
<input type="checkbox"/>	<input type="checkbox"/>	CELL Cell Phone			(405)555-6666
<input type="checkbox"/>	<input type="checkbox"/>	EMAL Email	<a href="mailto:jm@cox.net">jm@cox.net</a>		( ) -

MR101 - Member Records - Family / Organization Maintenance

Main | Family Info | Individual Info | Advisories | Email/Cell | Photos

Organization Act ID:

Family/Org #: 57 ...

Family/Org Name: Member, Jim & Jane ...

Num of Children: 1 Family Unlisted in RDS Unite



Chg/Add  
 Delete

Family Photo  
Member, Jim & Jane



Chg/Add  
 Delete

Couple Photo  
James and Jane Member

This photo is the family photo

## Member, Jim & Jane

### Primary Information

👤 Children **1**

📞 Phone: (405) 222-3333

📍 Address:

1544 Anystreet  
Anycity, OK 73034 U.S.A.

📍 Map Address

📍 Directions

### Other Contact Information

#### James (Jim) Member

✉ Email: [jm@cox.net](mailto:jm@cox.net)

📞 Phone: (405) 555-6666

📞 Call

✉ Text

#### Jane Member

✉ Email: [marilyn@rdsadvantage.com](mailto:marilyn@rdsadvantage.com)

📞 Phone: (405) 444-5555

📞 Call

✉ Text

#### Eric Member

✉ Email: No Email

### Family Members

👤 James (Jim) Member

👤 Jane Member

👤 Eric Member (7)

Close

### MR101 - Member Records - Family / Organization Maintenance

Main	Family Info	Individual Info	Advisories	Email/Cell	Photos	Activities	Attendance	Gifts	Notes	Contacts	Guardians	Volunteer Qualifications
Organization		Act ID:										
Family/Org #:	<input type="text" value="57"/>	Individual ID:		<input type="text" value="A1"/>								
Family/Org Name:	<input type="text" value="Member, Jim &amp; Jane"/>			Individual Name:		MEMBER,JIM						
Num of Children:	1	Family Unlisted in RDS Unite App		Linked to: A/P:		0		A/R:				
Delete	Add/Edit	Code & Description	Email	Address	Phone Ext							
<input type="checkbox"/>	<input type="checkbox"/>	CELL Cell Phone			(405)555-6666							
<input type="checkbox"/>	<input type="checkbox"/>	EMAL Email	<a href="mailto:jm@cox.net">jm@cox.net</a>		( ) -							

### MR101 - Member Records - Family / Organization Maintenance

Main	Family Info	Individual Info	Advisories	Email/Cell	Photos	Activities	Attendance	Gifts	Notes	Contacts	Guardians	Volunteer Qualifications
Organization		Act ID:										
Family/Org #:	<input type="text" value="57"/>	Individual ID:		<input type="text" value="A2"/>								
Family/Org Name:	<input type="text" value="Member, Jim &amp; Jane"/>			Individual Name:		MEMBER,JANE						
Num of Children:	1	Family Unlisted in RDS Unite App		Linked to: A/P:		0		A/R:				
Delete	Add/Edit	Code & Description	Email	Address	Phone Ext							
<input type="checkbox"/>	<input type="checkbox"/>	CELL Cell Phone			(405)444-5555							
<input type="checkbox"/>	<input type="checkbox"/>	EMAL Email	<a href="mailto:marilyn@rdsadvantage.com">marilyn@rdsadvantage.com</a>		( ) -							

The "Personal Information" is for the person who logged into the RDS Unite App.  
The "Personal Contact Information" is the CELL phone and EMAL email address.

## My Family

Family Photo



Select image

Family Primary Address >

Personal Information >

Personal Contact Information >

Save Changes Reload Profile

Personal Information

**First Name:**  
Jane

**Middle Name:**

**Last Name:**  
Member

**Preferred Name:**  
Jane

**Title:**  
Mrs.

**Previous Last Name:**

**Birthdate:**  
04/12/1950 Clear

**Baptism Date:**  
01/30/1965 Clear

**Marital Status:**  
Married

**Marital Date:**  
03/28/1978 Clear

**Gender:**  
 Female  Male

Last Modified: Mar 22, 2017 11:06 AM

Personal Contact Information >

Save Changes Reload Profile

Personal Contact Information

**Phone Numbers:**  
 (405) 444-5555   
Last Modified: Nov 20, 2017 8:32 AM

**Email Addresses:**  
 marilyn@rdsadvantage.co   
Last Modified: Jun 20, 2016 9:49 AM

Save Changes Reload Profile

## Merge Control Codes

In order for the RDS's Unite app Directory to display e-mail and cell phone information, email addresses that are to be used in the on-line directory must be recorded in RDS using the control code EMAL. Cell phone numbers that are to be used in the on-line directory must be recorded using control code CELL.

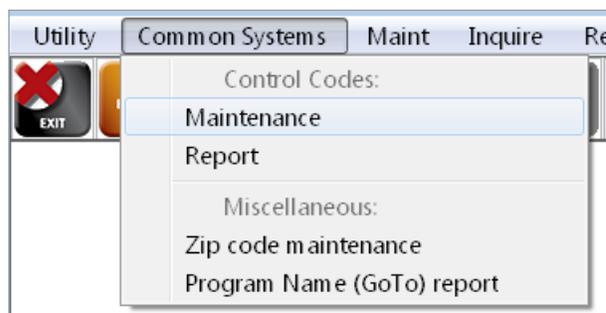
If an organization is using a control code other than EMAL or CELL for the email addresses and cell phone numbers, use RDS CS101 "merging control codes" to combine all email addresses (or cell phone numbers) that have been recorded under one control code and move them to another control code.

This is easy to accomplish.

From the dashboard go to Member Records:

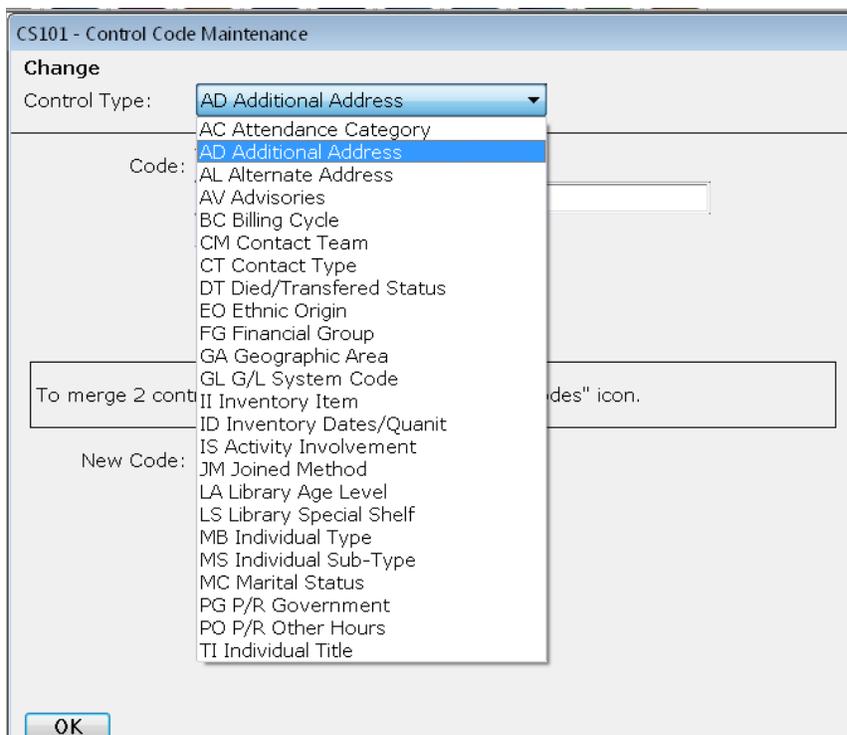


From the menu bar choose Common Systems. Under Control Codes select Maintenance:



Select Change mode.

Select Control Type AD for Additional Address. This code is used for all additional addresses and phone numbers:



Click on the look-up next to the word Code and choose the code from which you want to move the existing email addresses. In the example below we are moving addresses from EM-2.

To merge 2 control codes, press F3 or click the “Merge Codes” icon. **The new code must already exist in the RDS database.**



Then select EMAL from the list or enter the new code of EMAL (must already exist in RDS):

Value	Abbreviation	Description
ANAM	Alternate Name	Alternate Name
BUS	Bus Mailing Add	Business Mailing Address
BUSI	Business Name	Name of Business
CELL1	Insta Cell Ph	Cell Phone Used for Insta
CELL	Cell	Cell
CO	College Address	College Address
E-FR	Email Cont Stmt	Email for Contribution Sta
E-NL	EMAIL-NEWSLETTE	EMAIL-NEWSLETTERS
EM-2	2nd email addre	2nd email address
EMAL	Email	Email
EMAR	Email AR Stats	Email Address/Accounts Rec
EMER	Emergency	Emergency
EMHM	Home Email	Email address-home

The system will prompt:

Answer yes.

RDS will read all files and transfer (merge) existing records into the new EMAL code. The original control code is **not** deleted.

## My Activities

Fields used for allowing RDS Unite to “see” an activity.

Make sure the “Unlisted in RDS Unite” is NOT checked.

Optional:

Add a “Meeting Dates Description”

Add a URL (Internet address) for a page that has more information about the activity.

AC101 - Activity Set-Up Maintenance

Main Who Attends Insta Check-In Attend Categories Attend Print Volunteer Fee

Activity ID: BLOCK ... Description: Block Party

Type: ALL ... Org Number: ...

Sub-Type: ALL ... RDS UID: 85

Date Form: TEST ... test

Meeting Dates Description: All weekdays M-F  
(displays in RDS Unite App)

Include in Activity: Enrolled individuals

Sunday School

Time: 12:00 AM - 12:00 AM

Building: ...

Room: ...

Unlisted in RDS Unite

Social Media URL: <https://www.facebook.com/groups/1501721540057547/>  
(used in RDS Unite App)

## My Activities

My Activities allow a user to view their families existing activities and enroll in any they qualify for IF the activity is allowed in RDS Unite.

The user cannot remove enrollment in an activity after they click "Save Changes". If they want to remove the activity from their list they will need to contact the church.

(removing a person from an activity will delete all of their attendance information so it is not allowed)

Unite Your Church

A United Church Is An Effective Church.

The RDS Unite App Will Keep Your Members Connected.

Unite

### My Activities

Family Member:  
Jane Member

**+** **Adult Choir**  
Wed night at 7:00pm  
Leader: Sosha (Soosh) Adams  
Call Email Text

**✓** **Block Party**  
[f https://www.facebook.com/groups/150172](https://www.facebook.com/groups/150172)

**+** **Marriage Encounter** \$1.00 Benefits Received  
For handouts  
4th Saturday of each month at 6:00pm.  
Leader: James (Jim) Marusa  
Call Email Text

Enrolling in 1 activities. Total due: \$1.00

Save Changes

Refresh

User can select any member of their family and choose activities for them.

User can call, email, or text the leader setup for the activity in the RDS software.

User can click on the URL provided and see more details for the event on the Internet.

Available for selecting

Already enrolled

Available when activity selected

When user clicks "Save Changes" and there is amount due and you have a payment site setup, this window will pop-up and the user can pay immediately.

Enrollment Due

Total due: \$1.00

\$ Pay

Close

# My Activities



**Block Party** \$20.00

Per family fee to cover cost of catering  
All weekdays M-F  
**Leader:** Cindra Johannes

Call
 Email
 Text

f <https://www.facebook.com/groups/1501721540057547/>

FELLOWSHIP EVENTS

 **Call**

 **Email**

 **Text**

Call and Text uses the Phone number for the leader under setup under the code CELL.

Email uses the Email setup for the leader under the code EMAL.

MR101 - Member Records - Family / Organization Maintenance						
<span style="font-size: small;">Main   Family Info   Individual Info   Advisories   <b>Email/Cell</b>   Photos   Activities   Attendance   Gifts   Notes   Contacts   Guardians   Volunteer Qualifications</span>						
		Organization		Act ID:		
Family/Org #:		113		Individual ID:		A1
Family/Org Name:		Johannes, Cindra		Individual Name:		JOHANNES,CINDRA
Num of Children:		2		Linked to:		A/P: 0 A/R:
		Family Unlisted in RDS Unite App				
Delete	Add/Edit	Code & Description	Email	Address		Phone Ext
<input type="checkbox"/>	<input type="checkbox"/>	CELL Cell Phone				(405)627-4112
<input type="checkbox"/>	<input type="checkbox"/>	EMAL Email	cindra@rdsadvantage.com			( ) -

# My Activities

+

**Block Party** \$20.00 FELLOWSHIP EVENTS

Per family fee to cover cost of catering  
All weekdays M-F

**Leader:** Cindra Johannes

Call
Email
Text

<https://www.facebook.com/groups/1501721540057547/>

AC101 - Activity Set-Up Maintenance

Main Who Attends Insta Check-In Attend Categories Attend Print Volunteer Fee

Activity ID: BLOCK Description: Block Party

Type: ALL Org Number: ...

Sub-Type: ALL RDS UID: 85

---

Date Form: TEST test

Meeting Dates Description: All weekdays M-F  
(displays in RDS Unite App)

Include in Activity: Enrolled individuals

Sunday School

Time: 12:00 AM - 12:00 AM

Building: ...

Room: ...

Unlisted in RDS Unite

Social Media URL: <https://www.facebook.com/groups/1501721540057547/>  
(used in RDS Unite App)

AC101 - Activity Set-Up Maintenance

Main Who Attends Insta Check-In Attend Categories Attend Print Volunteer Fee

Activity ID: BLOCK Description: Block Party

Type: ALL Org Number: ...

Sub-Type: ALL RDS UID: 85

---

Revenue Code: 0400-315 FELLOWSHIP EVENTS

Fee Amount: 20.00

Fee Comment: Per family fee to cover cost of catering

AC103 - Enroll by Activity						
Delete	Activity ID	Block Party	Type: ALL	Males/Females/Mar		
	BLOCK	Block Party	Type: ALL	Males/Females/Mar		
	Date Form: TEST	test	Sub-Type: ALL			

Indiv/Org Name	Fam/Org Number	T/S	Inv	Primary	Position	Leader	Join Date
113 A1 I Cindra Johannes		A/	A	MEMBER		Yes	12/01/2016

This is the leader of the Block Party activity

AC101 - Activity Set-Up Maintenance

Main Who Attends Insta Check-In Attend Categories Attend Print Volunt

Activity ID: BLOCK Description: Block Party

Type: ALL Org Number: ...

Sub-Type: ALL RDS UID: 85

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Female

Male

Married

Single

Recommended

Absolute

Recommended

Absolute

Age Range: 0 - 999

You can limit what activities are available for any individual by selecting gender, marital status, and age range.