



Staff Guide for RDS Connect[®] Unite[®] 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

Unite

Sign in

Church code

User name (E-mail)

Password

Lost your password?

Don't have an account? [Register here](#)

Sign In

Sign In

Unite

Sign in

User name (E-mail)

Password

Lost your password?

Don't have an account? [Register here](#)

Sign In

Directory

Unite

Directory

Family Name

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Menu

Unite

Directory

My Family

My Activities

Contributions

My Account

Directory

Unite

My Family

Family Photo

Family Photo

Unite

My Activities

Family Member:

Jane Member

Adult Choir

Wed night at 7:00pm

Leader: Sosha (Soosh) Adams

Call Email Text

Unite

My Contributions

Make Contribution

List includes contributions for the prior calendar year and the current year-to-date.

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

Unite

My Account

Password Management

Current Password:

Current password

New Password:

New password

Confirm Password:

Confirm password

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.

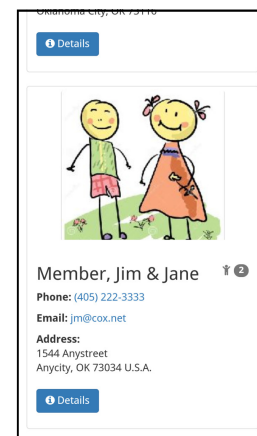
Click on the e-mail address to send e-mail.

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.

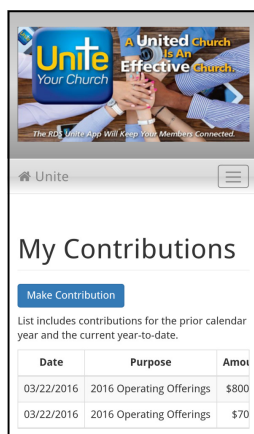
Privacy: If you do not want your address or phone number listed in the directory go to the My Family tab and touch “listed or unlisted” under each item until desired selection is accomplished. If deceased persons are listed in the database as Member Status X (deceased) they will not be displayed in the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

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

New/Add ☐ **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 ...

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

Num of Children: 2 **Family Unlisted in RDS Unite App**

Individual ID: A1 ...

Individual Name: MEMBER,JIM

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	jm@cox.net		() -

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**



☐ **Chg/Add**
☐ **Delete**

Family Photo
Member, Jim & Jane

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

📞 Phone: (405) 555-6666

📞 Call

✉ Text

Jane Member

✉ Email: 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 #: 57 ...

Individual ID: A1 ...

Family/Org Name: Member, Jim & 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	jm@cox.net		() -

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: A2 ...

Family/Org Name: Member, Jim & 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	marilyn@rdsadvantage.com		() -

The “Personal Information” is the 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





Family Primary Address 

Personal Information 

Personal Contact Information 

Personal Information

First Name:
Jane



Middle Name:



Last Name:
Member

Preferred Name:
Jane



Title:
Mrs.

Previous Last Name:

Birthdate:
04/12/1950  

Baptism Date:
01/30/1965  



Marital Status:
Married

Marital Date:
03/28/1978  



Gender:
☒ Female ☐ Male



Last Modified: Mar 22, 2017 11:06 AM



Personal Contact Information

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

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.

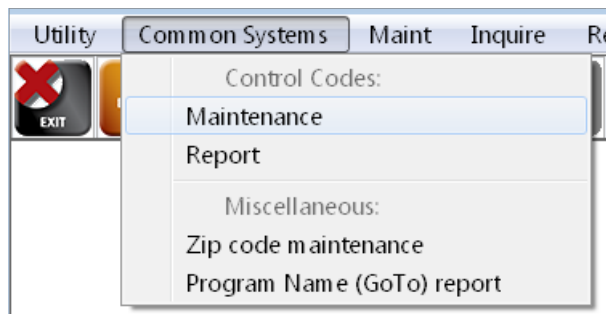
If an organization is using a control code other than EMAL or CELL for the email addresses and cell phone numbers, use RDS CS101 "merging control codes" to combine all email addresses (or cell phone numbers) that have been recorded under one control code and move them to another control code.

This is easy to accomplish.

From the dashboard go to Member Records:

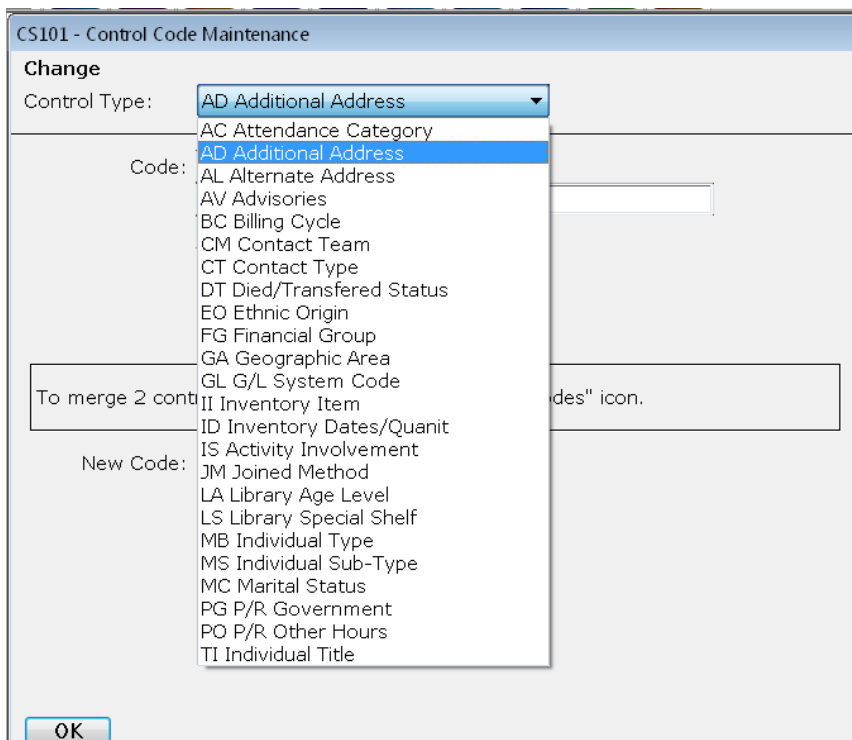


From the menu bar choose Common Systems. Under Control Codes select Maintenance:



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
CELL	Insta Cell Ph	Cell Phone Used for Insta
CELL	Cell	Cell
CO	College Address	College Address
E-FR	Email Cont Stat	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.

The screenshot shows the 'AC101 - Activity Set-Up Maintenance' window. It has a tabbed interface with 'Main' selected. The form contains several fields and sections:

- Activity ID:** BLOCK
- Description:** Block Party (circled in red)
- Type:** ALL
- Org Number:** (empty)
- Sub-Type:** ALL
- RDS UID:** 85
- Date Form:** TEST test
- Meeting Dates Description:** All weekdays M-F (circled in red)
(displays in RDS Unite App)
- Include in Activity:** Enrolled individuals (dropdown)
- ☐ Sunday School
- Time:** 12:00 AM - 12:00 AM
- Building:** (empty)
- Room:** (empty)
- ☐ Unlisted in RDS Unite
- Social Media URL:** <https://www.facebook.com/groups/1501721540057547/> (circled in red)
(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)

Family Member:
Jane Member

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

Block Party
<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

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 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/>

Call

Email

Text

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

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

MR101 - Member Records - Family / Organization Maintenance									
		<div> <div>Main</div> <div>Family Info</div> <div>Individual Info</div> <div>Advisories</div> <div>Email/Cell</div> <div>Photos</div> <div>Activities</div> <div>Attendance</div> <div>Gifts</div> <div>Notes</div> <div>Contacts</div> <div>Guardians</div> <div>Volunteer Qualifications</div> </div>							
		Organization		Act ID:					
Family/Org #:		113		Individual ID:		A1			
Family/Org Name:		Johannes, Cindra		Individual Name:		JOHANNES,CINDRA			
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)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
 Type: ALL
 Sub-Type: ALL

Description: Block Party
 Org Number:
 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
 Type: ALL
 Sub-Type: ALL

Description: Block Party
 Org Number:
 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	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
Volunteer

Activity ID: BLOCK
 Type: ALL
 Sub-Type: ALL

Description: Block Party
 Org Number:
 RDS UID: 85

☒ 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.