

## CL Dimensions PPT 2

How to:

- Get familiar with Group Details
- Add members to groups

Use with Session 1 Last rev. 4-05-07

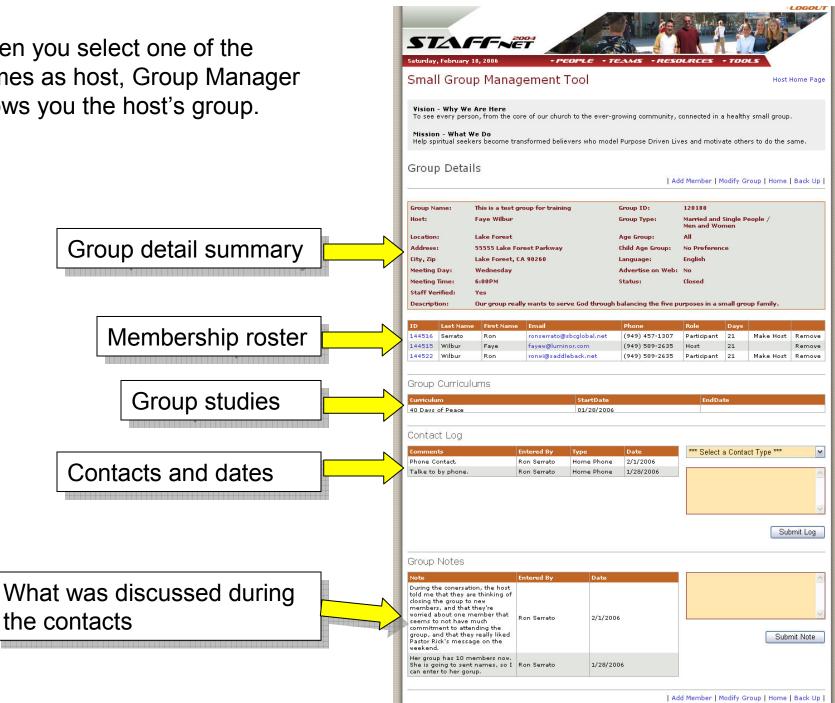
Staffnet and Group Manager orientation

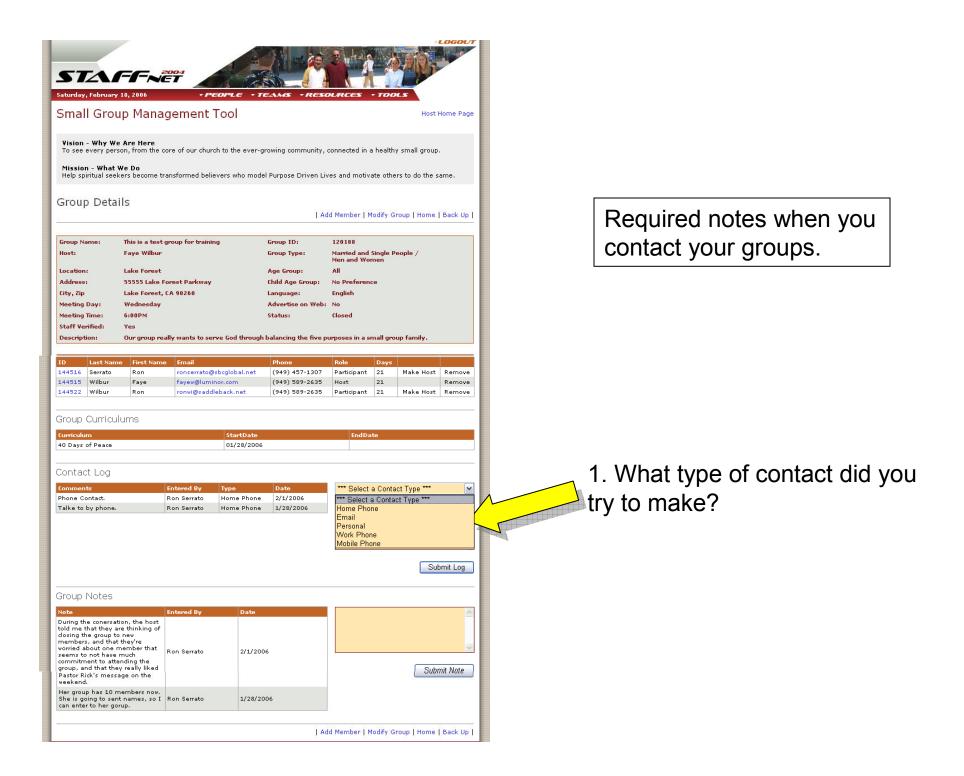
When you select one of the names as host, Group Manager shows you the host's group.

Group studies

Contacts and dates

the contacts





| To see<br>Missio<br>Help sp  | every pers   | We Do   |   | rch to the ever-        |                                |  |           |                | Home Page |
|--|--|---|---|-------------------------|--------------------------------|--|-----------|----------------|-----------|
| Help sp  | n - What V<br>viritual seek  | <b>We Do</b><br>ters become t   |   |                         | growing community, o           | connected in a                               | a health: | y small group  |           |
| Frou   |  |   | ransformed bel  | ievers who mod          | el Purpose Driven Liv          | es and motiv                                 | ate othe  | rs to do the s | ame.      |
|  | p Detai  | ils   |   |                         |                                |  |           |                |           |
|  |  |   |   |                         | Ad                             | d Member   N                                 | lodify G  | roup   Home    | Back Up   |
| iroup N  | ame:   | This is a test  | group for train   | ing                     | Group ID:                      | 120188                                       |           |                |           |
| lost:  |  | Faye Wilbur   |   |                         | Group Type:                    | Married and Single People /<br>Men and Women |           |                |           |
| ocatior  | n -  | Lake Forest   |   |                         | Age Group:                     | All  |           |                |           |
| ddress   |  |   | Forest Parkway  |                         | Child Age Group:               | No Preference                                |           |                |           |
| ity, Zip<br>leeting  |  | Lake Forest,<br>Wednesday   | CA 90260  |                         | Language:<br>Advertise on Web: | English                                      |           |                |           |
| leeting  |  | 6:00PM  |   |                         | Status:                        | No<br>Closed                                 |           |                |           |
| Staff Ve   | rified:  | Yes   |   |                         |                                |  |           |                |           |
| escrip   | tion:  | Our group re  | ally wants to se  | erve God through        | h balancing the five p         | urposes in a s                               | mall gro  | up family.     |           |
| D  | Last Nam   | e First Nam   | e Email   |                         | Phone                          | Role   | Days      |                |           |
| 44516  | Serrato  | Ron   | and the second se | @sbcglobal.net          | (949) 457-1307                 | Participant                                  | 21        | Make Host      | Remove    |
| 44515  | Wilbur   | Faye  | fayev@lum   |                         | (949) 589-2635                 | Host   | 21        |                | Remove    |
| 44522  | Wilbur   | Ron   | ronwi@sad   | dleback.net             | (949) 589-2635                 | Participant                                  | 21        | Make Host      | Remove    |
|  | Curricul   | lumo  |   |                         |                                |  |           |                |           |
|  | Curricul   | lums  |   |                         |                                |  |           |                |           |
| urriculi<br>0. Dawa  | im<br>of Peace   |   |   | StartDate<br>01/28/2006 |                                |  | te        |                |           |
| 0 0 445  | of Peace   |   |   | 101/20/2000             |                                |  |           |                |           |
| onta   | et Log   |   |   |                         |                                |  |           |                |           |
| ommen  | its  |   | Entered By  | Туре                    | Date                           | Home Phor                                    | ie        |                | <b>~</b>  |
| hone C   |  |   | Ron Serrato   | Home Phone              | 2/1/2006                       |  |           |                |           |
| 'alke to   | by phone.  |   | Ron Serrato   | Home Phone              | 1/28/2006                      |  |           |                | <u>^</u>  |
|  |  |   |   |                         |                                |  |           |                | 4         |
|  |  |   |   |                         |                                |  |           |                |           |
|  |  |   |   |                         |                                |  |           |                |           |
|  |  |   |   |                         |                                |  |           | Subi           | mit Log   |
|  |  |   |   |                         |                                |  |           |                |           |
|  |  |   |   |                         |                                |  |           |                |           |
| roup   | Notes  |   |   |                         |                                |  |           |                |           |
|  | Notes  |   | Entound Pu  | Date                    |                                |  |           |                |           |
| lote<br>During t   | he conersat  | ion, the host   | Entered By  | Date                    |                                |  |           |                | ~         |
| Note<br>Ouring t<br>old me<br>losing t   | he conersat<br>that they a<br>he group to  | re thinking of<br>new   | Entered By  | Date                    |                                |  |           |                | ~         |
| Note<br>During t<br>told me<br>closing t<br>member<br>worried a  | he conersat<br>that they a<br>he group to<br>'s, and that<br>about one n   | re thinking of<br>new<br>they're<br>nember that   | Entered By<br>Ron Serrato   | 2/1/20                  | 06                             |  |           |                | ~         |
| Note<br>During t<br>told me<br>dosing t<br>member<br>worried a<br>seems t  | he conersat<br>that they ai<br>he group to<br>'s, and that<br>about one n<br>o not have<br>nent to atte  | re thinking of<br>new<br>they're<br>nember that<br>much<br>ending the                     |   |                         | 06                             |  |           |                | ~         |
| Note<br>During t<br>told me<br>dosing t<br>dosing t<br>worried a<br>worried a<br>seems t<br>seems t<br>commitr<br>group, a<br>Pastor R | he conersat<br>that they a<br>he group to<br>'s, and that<br>about one n<br>o not have<br>nont to atte<br>nd that the<br>ick's messa                     | re thinking of<br>o new<br>they're<br>nember that<br>much<br>ending the<br>y really liked |   |                         | 06                             |  |           | Subr           | nit Note  |
| Note<br>During t<br>cold me<br>closing t<br>worried a<br>seems t<br>commitr<br>group, a<br>Pastor R<br>weekend<br>Her grou             | he conersat<br>that they a<br>he group to<br>'s, and that<br>about one n<br>o not have<br>nent to atte<br>nd that the<br>ick's messa<br>J.<br>p has 10 m | re thinking of<br>o new<br>they're<br>nember that<br>much<br>ending the<br>y really liked | Ron Serrato   |                         |                                |  |           | Subr           | nit Note  |

Required notes when you contact your groups.

2. Was the contact successful, ie. "Talked to Bob by phone" or "left message for Bob to return my call" or "sent email to Bob?" If it wasn't successful, what time of day did you try to contact the host?

| Vision - Why We A<br>To see every person<br>Mission - What We<br>Help spiritual seeker  | , from the o  |   | ch to the ever-g                       |                                |                             |          |             |         |
|---|---|---|--|--------------------------------|-----------------------------|----------|-------------|---------|
|   |   |   | evers who mode                         |                                |                             |          |             |         |
| Group Details   | 5   |   |  | Ad                             | d Member   M                | lodify G | roup   Home | Back Up |
| Group Name: T   | his is a test   | group for traini  | ng                                     | Group ID:                      | 120188                      |          |             |         |
|   | aye Wilbur  |   |  | Group Type:                    | Married and Single People / |          |             |         |
| Location: L   | ako Ecuart  |   |  | Ann Cunura                     | Men and Wo                  | nen      |             |         |
|   | ake Forest<br>5555 Lake I   | Forest Parkway  |  | Age Group:<br>Child Age Group: | No Preferen                 | -0       |             |         |
|   | ake Forest,   |   |  | Language:                      | English                     |          |             |         |
|   | Vednesday   |   |  | Advertise on Web:              |                             |          |             |         |
|   | :00PM   |   |  | Status:                        | Closed                      |          |             |         |
| Staff Verified: Y   | 'es   |   |  |                                |                             |          |             |         |
| Description: 0  | )ur group re  | ally wants to se  | rve God through                        | balancing the five p           | urposes in a si             | nall gro | up family.  |         |
| D Last Name   | First Nam   | e Email   |  | Phone                          | Role                        | Days     |             |         |
| 44516 Serrato   | Ron   | the set of | @sbcglobal.net                         | (949) 457-1307                 | Participant                 | 21       | Make Host   | Remove  |
| 44515 Wilbur  | Faye  | fayev@lumi  |  | (949) 589-2635                 | Host                        | 21       |             | Remove  |
| 144522 Wilbur Ron   |   | ronwi@saddleback.net  |  | (949) 589-2635                 | Participant                 | 21       | Make Host   | Remove  |
|   |   |   |  |                                |                             |          |             |         |
| Group Curricului  | ms  |   |  |                                |                             |          |             |         |
| Curriculum  |   |   | StartDate                              |                                | EndDa                       | he i     |             |         |
| 40 Days of Peace  |   | and the second se   |  |                                |                             |          |             |         |
|   |   |   | 01/28/2006                             |                                |                             | ue -     |             |         |
|   |   |   | 01/28/2006                             |                                |                             | ue.      |             |         |
|   |   |   | 01/28/2006                             |                                |                             |          |             |         |
| ontact Log  |   | Entered By  |  | Date                           | *** Select                  |          | ct Type *** |         |
| Contact Log   |   | Entered By<br>Ron Serrato   | 01/28/2006                             | Date<br>2/1/2006               | *** Select                  |          | ct Type *** |         |
| Contact Log<br>Comments<br>Phone Contact.<br>Talke to by phone.   |   |   | Туре                                   |                                | *** Select                  |          | ct Type *** |         |
| Contact Log<br>Comments<br>Phone Contact.   |   | Ron Serrato   | Type<br>Home Phone                     | 2/1/2006                       | *** Select                  |          | ct Type *** |         |
| Contact Log<br>Comments<br>Phone Contact.   |   | Ron Serrato   | Type<br>Home Phone                     | 2/1/2006                       | *** Select                  |          | ct Type *** |         |
| Contact Log<br>Comments<br>Phone Contact.   |   | Ron Serrato   | Type<br>Home Phone                     | 2/1/2006                       | *** Select                  |          | ct Type *** |         |
| Contact Log<br>Comments<br>Phone Contact.   |   | Ron Serrato   | Type<br>Home Phone                     | 2/1/2006                       | *** Select                  |          |             |         |
| Contact Log<br>Comments<br>Phone Contact.   |   | Ron Serrato   | Type<br>Home Phone                     | 2/1/2006                       | *** Select                  |          |             |         |
| Contact Log<br>Comments<br>Phone Contact.   |   | Ron Serrato   | Type<br>Home Phone                     | 2/1/2006                       | *** Select                  |          |             |         |
| Contact Log<br>Comments<br>Phone Contact.<br>Falke to by phone.   |   | Ron Serrato   | Type<br>Home Phone                     | 2/1/2006                       | *** Select                  |          |             |         |
| Contact Log<br>Comments<br>Phone Contact.<br>Talke to by phone.<br>Sroup Notes  |   | Ron Serrato<br>Ron Serrato  | Type<br>Home Phone<br>Home Phone       | 2/1/2006                       | *** Select                  |          |             |         |
| Contact Log<br>Comments<br>Phone Contact.<br>Failke to by phone.<br>Siroup Notes<br>Note  |   | Ron Serrato   | Type<br>Home Phone                     | 2/1/2006                       | *** Select                  |          |             |         |
| Contact Log<br>Comments<br>Phone Contact.<br>Falke to by phone.<br>Falke to by phone.   | thinking of   | Ron Serrato<br>Ron Serrato  | Type<br>Home Phone<br>Home Phone       | 2/1/2006                       | *** Select                  |          |             |         |
| Contact Log<br>comments<br>Phone Contact.<br>Falke to by phone.<br>Falke to by phone.<br>Group Notes<br>Note<br>During the conersation<br>old me that they are<br>losing the group to n<br>members, and that th   | thinking of<br>ew<br>ey're  | Ron Serrato<br>Ron Serrato  | Type       Home Phone       Home Phone | 2/1/2006<br>1/28/2006          | *** Select                  |          |             |         |
| Contact Log<br>Comments<br>Phone Contact.<br>Talke to by phone.<br>Talke to by phone.<br>Scoup Notes<br>Note<br>During the conersation<br>closing the group to n<br>members, and that th<br>worried about one mei   | thinking of<br>ew<br>ey're<br>mber that<br>uch  | Ron Serrato<br>Ron Serrato  | Type<br>Home Phone<br>Home Phone       | 2/1/2006<br>1/28/2006          | *** Select                  |          |             |         |
| Contact Log<br>Comments<br>Phone Contact.<br>Talke to by phone.<br>Talke to by phone.<br>Group Notes<br>During the conersation<br>told me that they are<br>closing the group to n<br>members, and that the<br>worried about one me<br>seems to not have mu<br>commitment to attend  | thinking of<br>ev<br>ey're<br>mber that<br>uch<br>ling the<br>eally liked                           | Ron Serrato<br>Ron Serrato  | Type       Home Phone       Home Phone | 2/1/2006<br>1/28/2006          | *** Select                  |          | Sut         | mit Log |
| Contact Log<br>Comments<br>Phone Contact.<br>Talke to by phone.<br>Talke to by phone.<br>Group Notes<br>During the conersation<br>told me that they are<br>During the conersation<br>told me that they are<br>consid the group to n<br>members, and that th<br>seems to not have mu | thinking of<br>ev<br>ey're<br>mber that<br>uch<br>ling the<br>eally liked                           | Ron Serrato<br>Ron Serrato  | Type       Home Phone       Home Phone | 2/1/2006<br>1/28/2006          | *** Select                  |          | Sut         |         |
| Contact Log<br>Comments<br>Phone Contact.<br>Talke to by phone.<br>Talke to by phone.<br>Stroup Notes<br>Note<br>During the conersation<br>Colosing the group to n<br>members, and that they are<br>seems to not have mu<br>serems to not have the<br>pastor Rick's message         | thinking of<br>ew<br>ey're<br>mber that<br>uch<br>ling the<br>eally liked<br>e on the<br>mbers now. | Ron Serrato<br>Ron Serrato  | Type       Home Phone       Home Phone | 2/1/2006<br>1/28/2006          | *** Select                  |          | Sut         | mit Log |

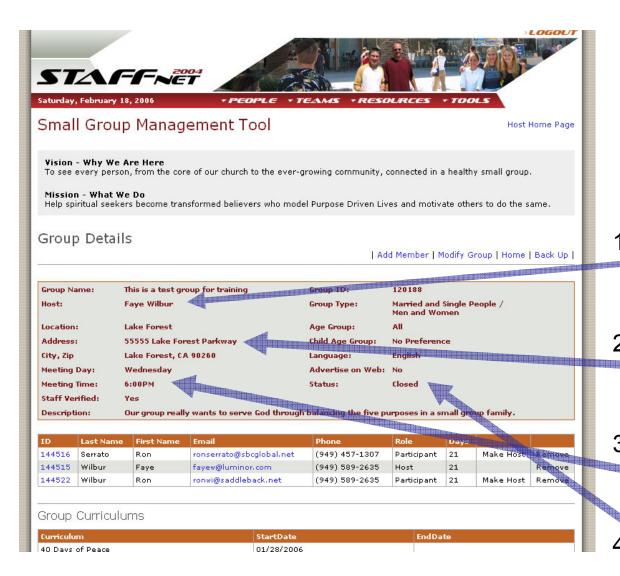
Optional notes when you contact your groups.

3. What was discussed during your contact that you want to remember about the host? You can also cut and paste emails from the host into this note area. Don't forget to Click "Submit Note"

| Missio<br>Help sp  | n - What V   | <b>/e Do</b><br>ers become t   |                            | evers who mode             | growing community, o             |                           |           |                |          |
|--|--|--|----------------------------|----------------------------|----------------------------------|---------------------------|-----------|----------------|----------|
| Frou   | ) Detai  | s  |                            |                            | al Purpose Driven Liv            | es and motiv              | ate othe  | rs to do the s |          |
|  |  |  |                            |                            | Ad                               | ld Member   M             | 1odify G  | roup   Home    | Back Up  |
| roup Na  | ame:   |  | group for traini           | ng                         | Group ID:                        | 120188                    |           |                |          |
| ost:   |  | Faye Wilbur  |                            |                            | Group Type:                      | Married and<br>Men and Wo | nen       | eople /        |          |
| ocation<br>ddress  |  | Lake Forest  | Forest Parkway             |                            | Age Group:<br>Child Age Group:   | All<br>No Preferen        |           |                |          |
| ity, Zip   |  | Lake Forest,   |                            |                            | Language:                        | English                   |           |                |          |
| eeting   | Day:   | Wednesday  |                            |                            | Advertise on Web:                | No                        |           |                |          |
| eeting   |  | 6:00PM   |                            |                            | Status:                          | Closed                    |           |                |          |
| taff Ve<br>escript   |  | Yes<br>Our aroup re  | ally wants to se           | rve God through            | n balancing the five pu          | urnoses in a s            | mall grou | un family.     |          |
|  |  |  |                            | -                          |                                  |                           |           |                |          |
|  | Last Name  | the second s |                            |                            | Phone                            | Role                      | Days      |                | Bernove  |
| 44516<br>44515   | Serrato<br>Wilbur  | Ron<br>Faye  | fayev@lum                  | )sbcglobal.net<br>inor.com | (949) 457-1307<br>(949) 589-2635 | Participant<br>Host       | 21        | Make Host      | Remove   |
| 44522  | Wilbur   | Ron  |                            | lleback.net                | (949) 589-2635                   | Participant               | 21        | Make Host      | Remove   |
|  |  |  |                            |                            |                                  |                           |           |                |          |
| roup   | Curricul   | ums  |                            |                            |                                  |                           |           |                |          |
| urriculu   | mi:  |  |                            | StartDate                  |                                  | EndDa                     | te        |                |          |
| D Davs   | of Peace   |  |                            | 01/28/2006                 | r                                |                           |           |                |          |
| - 18   | 8.57   |  |                            |                            |                                  |                           |           |                |          |
| ontac  | t Log  |  |                            |                            |                                  |                           |           |                |          |
| ommen  |  |  | Entered By                 | Туре                       | Date                             | *** Select                | a Conta   | ct Type ***    | ~        |
| none C<br>alke to  | ontact.<br>by phone.   |  | Ron Serrato<br>Ron Serrato | Home Phone<br>Home Phone   | 1000                             |                           |           |                |          |
|  | -,   |  |                            |                            |                                  |                           |           |                |          |
|  |  |  |                            |                            |                                  |                           |           |                |          |
|  |  |  |                            |                            |                                  |                           |           |                | 2        |
|  |  |  |                            |                            |                                  |                           |           |                |          |
|  |  |  |                            |                            |                                  |                           |           | Sub            | bmit Log |
|  |  |  |                            |                            |                                  |                           |           |                |          |
|  |  |  |                            |                            |                                  |                           |           |                |          |
| roup   | Notes  |  | Entered By                 | Date                       |                                  |                           |           |                | <u>^</u> |
| ote  |  |  | -                          |                            |                                  |                           |           |                |          |
| ote<br>uring th<br>Id me   | e conersati<br>hat they ar   | on, the host<br>e thinking of  |                            |                            |                                  |                           |           |                |          |
| ote<br>uring th<br>old me<br>osing th<br>iember  | e conersati<br>hat they ar<br>he group to<br>s, and that   | e thinking of<br>new<br>they're  |                            |                            |                                  |                           |           |                |          |
| ote<br>uring th<br>old me i<br>osing th<br>nember<br>orried a<br>eems to                       | te conersati<br>that they ar<br>he group to<br>s, and that<br>bout one m<br>o not have r   | e thinking of<br>new<br>they're<br>nember that<br>nuch   | Ron Serrato                | 2/1/20                     | J6                               |                           |           |                | V        |
| ote<br>uring th<br>old me i<br>osing th<br>nember<br>orried a<br>eems to<br>pommitm<br>roup, a | e conersati<br>that they ar<br>he group to<br>s, and that<br>bout one m<br>o not have r<br>hent to atte<br>hd that they              | e thinking of<br>new<br>they're<br>nember that<br>much<br>nding the<br>v really liked                          |                            | 2/1/20                     | 06                               |                           |           | Subr           | wit Note |
| old me<br>losing the<br>nember<br>orried a<br>eems to<br>ommitm<br>roup, a                     | e conersati<br>that they ar<br>be group to<br>s, and that<br>bout one m<br>o not have m<br>ent to atte<br>nd that they<br>ck's messa | e thinking of<br>new<br>they're<br>nember that<br>much<br>nding the<br>v really liked                          |                            | 2/1/20                     | 06                               |                           |           | Subr           | mit Note |

Optional notes when you contact your groups.

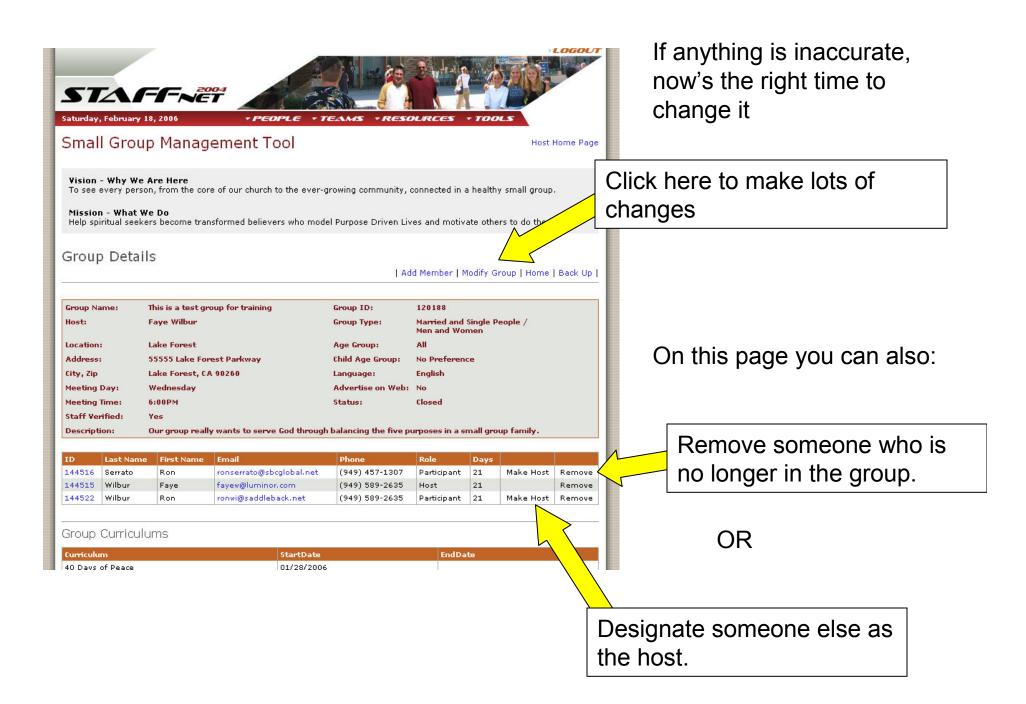
4. What information did you learn about the group (not the host) that you want to be able to remember?



When you call the host -

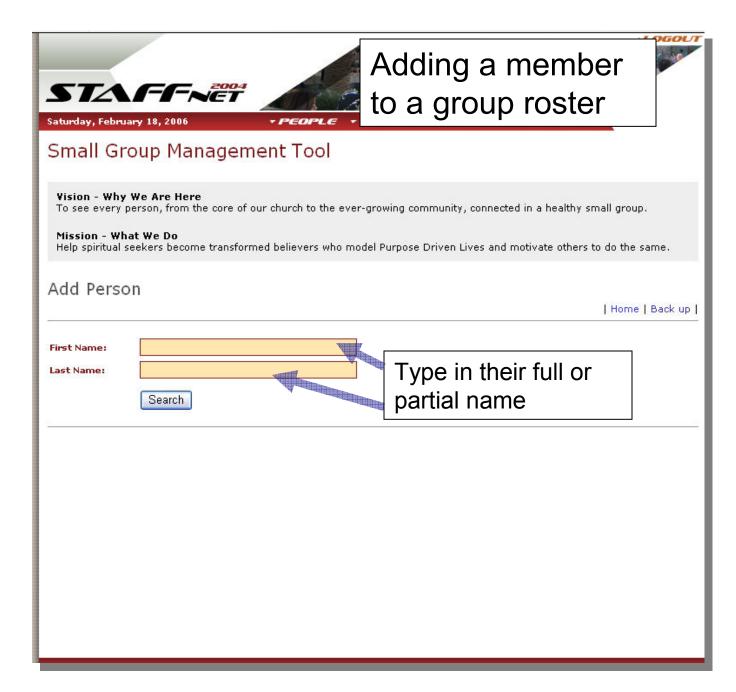
confirm the accuracy of group information

- Is your group still
   meeting and are you still the host?
- 2. Is the group still meetingat 55555 Lake ForestParkway?
- 3. Are you still meeting on
  Wednesday nights at 6pm?
- 4. Is the group still (open) (closed) to new members?



| Vision - Why We a   | o Management Tool  | • TEAMS • RESOL                        | URCES - TOO  | / small group.                         |   |   |
|---|--|--|--|--|---|---|
|   | e Do<br>rs become transformed believers wh<br>p Information  | o model Purpose Driven Live            | s and motivate othe  | rs to do the same.<br>  Home   Back Up | Look at all the group<br>information you can<br>change.                 | ) |
| Group ID:<br>Group Name:<br>Marital Group Type:<br>Gender Group Type:<br>Language:<br>Age Group:<br>Child Age Group:<br>Curriculum:<br>Description: | 120188<br>This is a test group for training<br>Married and Single People  Men and Women Finglish All No Preference 40 Days of Peace Our group really wants to<br>purposes in a small group | 10 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 | Wednesday<br>6 • : 00 • F<br>Lake Forest<br>55555 Lake Forest<br>Lake Forest<br>California<br>90260<br>United States<br>Lancing the five | t Parkway                              |   |   |
| Open:<br>Advertise on Web:<br>Staff Verified:   | Submit   |  | meml<br>"Adve  | bers, che<br>ertise on \               | open to new<br>ck "Open" and also<br>Neb" so the group<br>Group Finder. |   |
|   | -  | ou've made a<br>s, click "Sub          |  |  |   |   |

| x 8/ 13                | February                         | <b>FF</b>            | ET<br>PEOPLE -1                | TEAMS - RESI           | to   |          |                |           | embe<br>oster | r   |       |
|------------------------|----------------------------------|----------------------|--------------------------------|------------------------|--|----------|----------------|-----------|---------------|-----|-------|
| Vision ·               | - Why We                         | Are Here             | gement Tool                    | growing community,     | connected in                                 | a health |                | Home Page | ר "Add        | Mer | nher" |
| Help spi               | ) - <b>What N</b><br>ritual seek | ers become tr        | ansformed believers who mod    |                        |  |          | roup   Home    | ame.      |               |     |       |
| Group Na               | ime:                             | This is a test (     | group for training             | Group ID:              | 120188                                       |          |                |           |               |     |       |
| Host:                  |                                  | Faye Wilbur          |                                | Group Type:            | Married and Single People /<br>Men and Women |          |                |           |               |     |       |
| Location:              |                                  | Lake Forest          |                                | Age Group:             | All  |          |                |           |               |     |       |
| Address:               | 6                                | 55555 Lake F         | orest Parkway                  | Child Age Group:       | No Preference                                |          |                |           |               |     |       |
| City, Zip              |                                  | Lake Forest,         | CA 90260                       | Language:              | English                                      |          |                |           |               |     |       |
| Meeting I              |                                  | Wednesday            |                                | Advertise on Web:      |  |          |                |           |               |     |       |
| Meeting 1              |                                  | 6:00PM               |                                | Status:                | Closed                                       |          |                |           |               |     |       |
| Staff Ver<br>Descripti |                                  | Yes<br>Our group re: | ally wants to serve God throug | h halancing the five n | uenosos in a s                               | mall are | un familu      |           |               |     |       |
| - ascripti             |                                  | La group let         | ,                              |                        |  |          |                |           |               |     |       |
| ID                     | Last Nam                         | e First Name         | Email                          | Phone                  | Role   | Days     |                | ļ         |               |     |       |
| 144516                 | Serrato                          | Ron                  | ronserrato@sbcglobal.net       | (949) 457-1307         | Participant                                  | 21       | Make Host      | Remove    |               |     |       |
| 144515                 | Wilbur                           | Faye                 | fayew@luminor.com              | (949) 589-2635         | Host   | 21       | and the second | Remove    |               |     |       |
| 144522                 | Wilbur                           | Ron                  | ronwi@saddleback.net           | (949) 589-2635         | Participant                                  | 21       | Make Host      | Remove    |               |     |       |
| Group                  | Curricul                         | ums                  |                                |                        |  |          |                |           |               |     |       |
| Curriculu              | m                                |                      | StartDate                      |                        | EndDa  | te       |                |           |               |     |       |
| 40 Davs (              | of Peace                         |                      | 01/28/2000                     | 6                      |  |          |                |           |               |     |       |



| STAFFNET<br>Saturday, February 18, 2006   | Adding a member<br>to a group roster   |                      |
|---|--|----------------------|
| Small Group Management Tool   |  |                      |
| Mission - What We Do  | e ever-growing community, connected in a healthy small group.<br>ho model Purpose Driven Lives and motivate others to do the sam   | ie.                  |
| Add Person  | Home   B   | adk up l             |
|   | Findine Fib  | Confirm that this is |
| First Name: Ron<br>Last Name: Wilbur  |  | the correct person   |
| Search  |  | and Click "Select"   |
| be processed. Newly added individual will not be v<br>Last Name First Name Address City | n SELECT. Adding of an individual could take up to 15 minurisible under the new role until the process is completed.           Phone         Email           anta Margarita         9495892635         Fonwi@saddleback.net           Note – this addition         takes time before the         person shows up on           the roster         the roster         the roster | Select               |