My ChurchSuite User Guide

Introduction

My ChurchSuite is the member-facing side of ChurchSuite.

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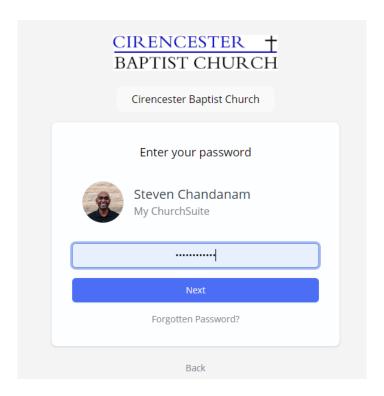
1. Getting started

It's important to say at the outset that access to My ChurchSuite for any member is granted by invitation only; a process that begins with you being sent an email invitation; so, **it's important we have your correct email address**. If you've not received your invitation, get in touch with the church office. The invitation email contains a unique login-link that is used to access My ChurchSuite for the first time and to set your password.

My ChurchSuite is not available for children (under 18) contacts for data protection and safeguarding reasons.

For the purposes of this guide, screenshots taken from within a browser environment.

To log in, click on or type this into your browser <u>login.churchsuite.com</u> and follow the on-screen instructions to search for Cirencester Baptist Church. Next, enter your **email address**, and when prompted, your **password**. Click **Login**. Also note the option to request a password reset email by clicking **Forgotten Password**.



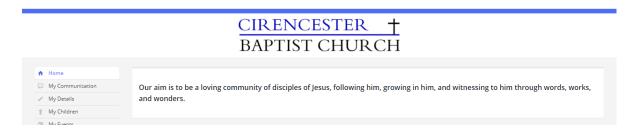
Once you've successfully logged in, you'll be taken to the My ChurchSuite **Home** page.



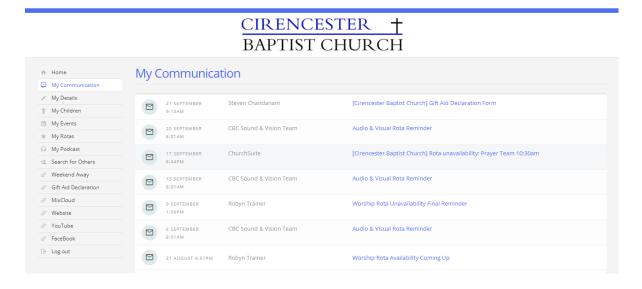
Navigation in a web browser is via the **Menu** on the left-hand side of the screen. We'll now work through each of the menu options in turn.

2. Home

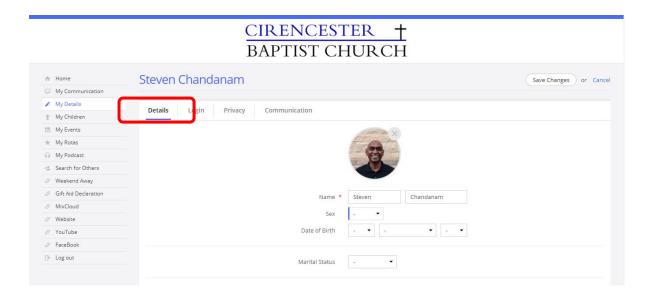
The **Home** page displays a brief welcome message and shows the next three upcoming featured events at our church (if any). Clicking on a featured event will take you straight into the event page to see further information about the event. You can even sign-up (if it's a sign-up event).



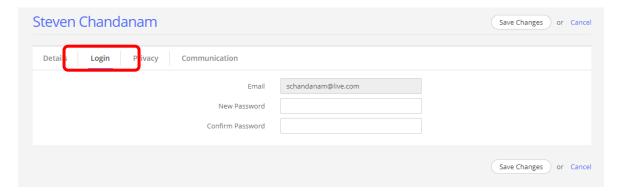
3. My Communication is a summary of all the recent communications sent to you from the church – perhaps a rota reminder.



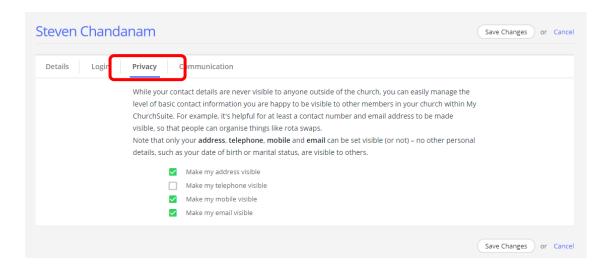
4. My Details shows a summary of the main contact information the church holds about you on its database. This information is only visible to you unless you choose to set some of your basic contact details visible to others in the church through your privacy settings (see below). It enables you to review or update your personal information, perhaps adding missing information – that's always helpful to the church.



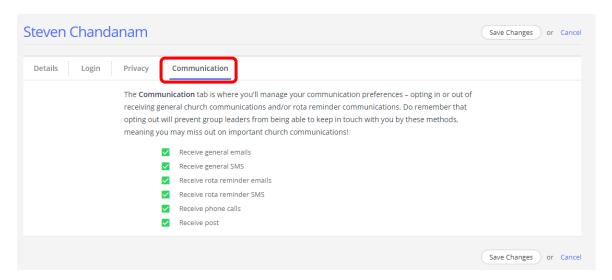
On the **Login** tab you can change your password.



A key area of interest will be your **Privacy** settings. While your contact details are never visible to anyone outside of our church, you can easily manage the level of basic contact information you are happy to be visible to other members in our church within My ChurchSuite. It's helpful for at least a contact number and email address to be made visible, so that people can organise things like rota swaps.



The **Communication** tab is where you'll manage your communication preferences – opting in or out of receiving general church communications and/or rota reminder communications. Do remember that opting out will prevent the church from being able to keep in touch with you by these methods.



Remember to save any changes you make. Then press **Home** to return to the Home page.

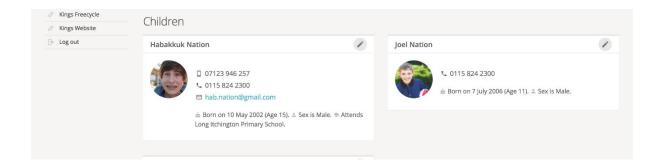
When first logging in to My ChurchSuite, you may see the following message on the **Home** page alerting you that <u>none</u> of your basic contact details, including your name, are visible to others in My ChurchSuite.



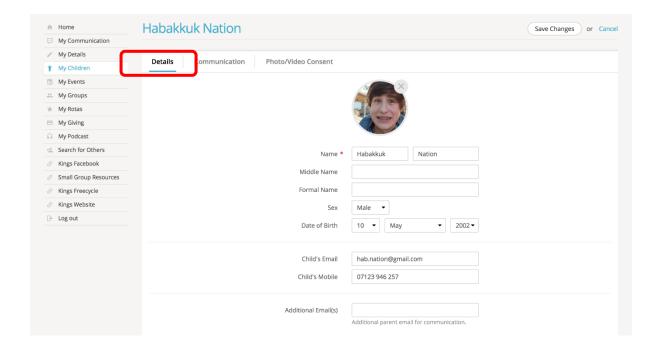
We encourage you to review your **Privacy Settings** and set your **name** and <u>at least one means of contact</u> to be visible. You can be reassured that your name and any other basic contact details that you do choose to set visible to others...

5. My Children

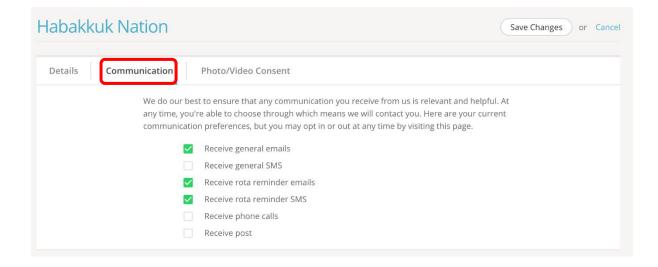
The **My Children** menu is only visible to parents. The **My Children** page enables parents to manage the information for each of their children. Parents can even add new children without needing to ask someone in the church office to do it for them!



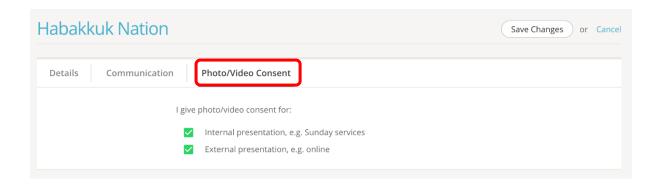
Just like the **My Details** page for adults, clicking on the pencil icon in the top-right corner of a child will take parents into the **Details** page for that child, where they can update or add missing information, such as medical conditions, allergies, or additional needs.



The child's **Communication** page is where parents manage their child's communication preferences – opting them in or out of receiving general church communications and/or rota reminder communications. Do remember that opting out will prevent the church leaders from being able to keep in touch with the child by these methods.

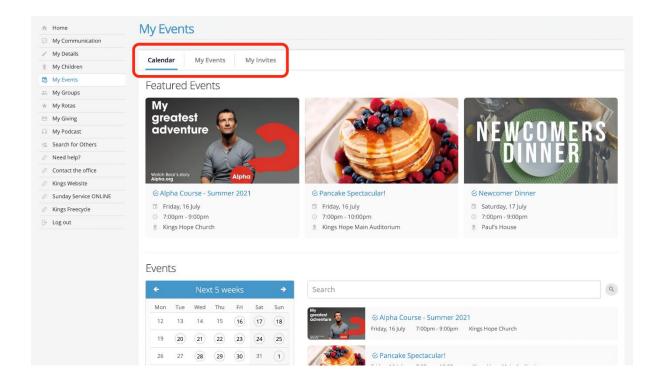


Finally, the **Photo/Video Consent** page is where parents can manage their child's photo and video consents for internal and external presentations.

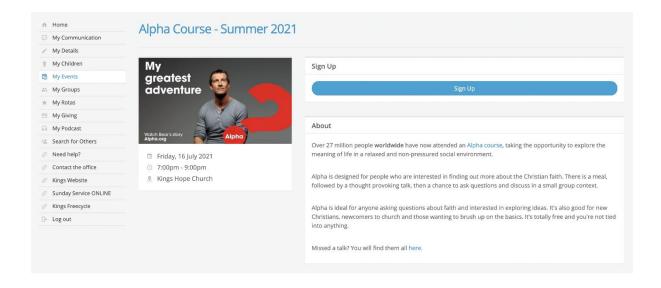


6. My Events

The **My Events** section is our church's events **Calendar** showing upcoming featured events and a searchable calendar of future events. If you've signed up to a future event, if you overseer a future event, or if you've been sent an invitation to a future event, you'll see that information surfaced within two additional tabs.



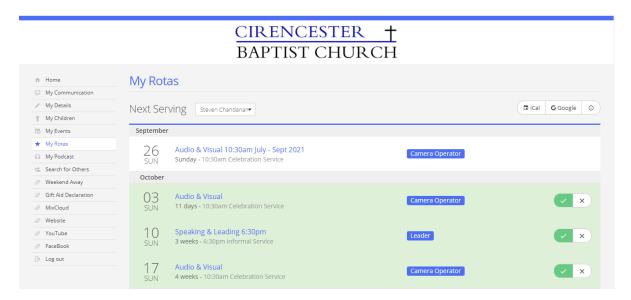
Clicking on any event in a list will open the event page to view, giving you further information about that event, and where applicable you may be able to **sign-up**, (and for 'pay' events, to pay for tickets online). All your details are pre-populated into an event's sign-up page, so it's easy to complete an event sign-up form with just a few clicks.



7. My Rotas

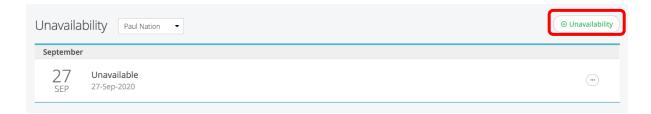
The My Rotas section displays all your upcoming serving commitments and rotas. You'll only see the My Rotas page if you have future serving dates on a current published rota, or if there are rotas published that you can sign up to, or if you are a ministry overseer.

At the top of the My Rotas page is the **Next Serving** section listing your upcoming serving and that of your linked family members – the dates, rotas and roles assigned.

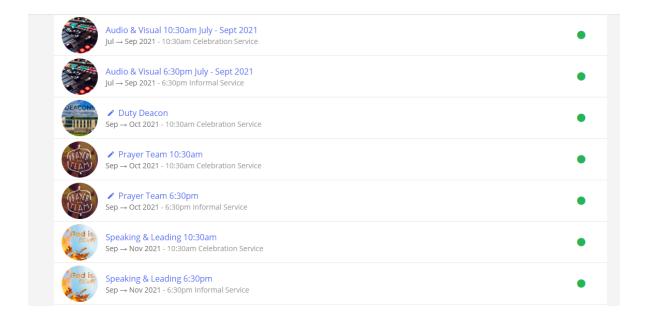


Rota names shown in red indicate a rota date clash, where you're scheduled to serve at the same date/time on other rotas. It's of course perfectly possible to be on multiple rota dates at the same time, but some clashes may require you to organise a swap, or to ask to be removed from a rota. For rotas with 'accept/decline/ enabled you'll have the option to accept or decline. *Accepts* are shown with a green background. Rotas shown in red strikethrough on a red background indicate 'unavailability' - *unavailability* that you've specifically blocked out (affecting all rotas for the unavailable dates) or a rota date that you've 'declined'. You'll continue to see these rota dates listed if your ministry overseer hasn't yet replaced you on the rota; or you may be required to organise a swap.

Scrolling down the My Rotas page further is the **Unavailability** section. Here you can add your unavailability block out dates - perhaps for holidays or known dates when you won't be available to serve on any rota. Adding unavailability sets you as unavailable for all rotas in that range of unavailable dates. By adding unavailability your rota overseers can more easily manage their rotas, planning and identifying gaps ahead of time.

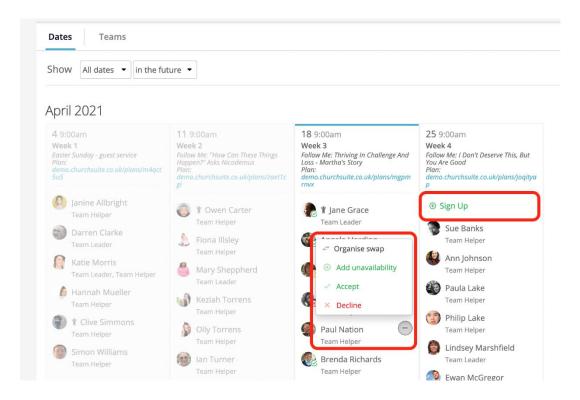


Finally, below the Unavailability section is a list of all your **Rotas**. Rotas with a pencil icon represent rotas that you oversee; those without a pencil icon are rotas that you belong to. Once a rota ends or your final date on a rota passes, that rota will disappear from the list. Rotas with a green traffic light (see image above) on the right-hand side are *published* rotas – the rota is live and visible to all rota members. Ministry overseers may also see their rotas with a red traffic light, indicating that the rota is still in *draft*. Draft rotas are only visible to overseers and not visible to rota members until they are published. Essentially overseers can plan, create rotas and work on them without them being visible to rota members until they are ready to be published.

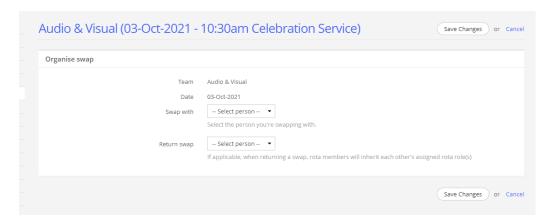


Clicking into a rota displays the rota **Dates** where you can see all the people serving on the rota and their roles. Depending on the rota's settings, it may also be possible for you to **Sign Up** to future dates on the rota, to **Accept** or **Decline**, to **Organise a swap** with others, or **Add unavailability**. Previously accepted serving can be declined, and vice-

versa, without constraint. Declining a rota date will send a decline notification to the rota's overseer.



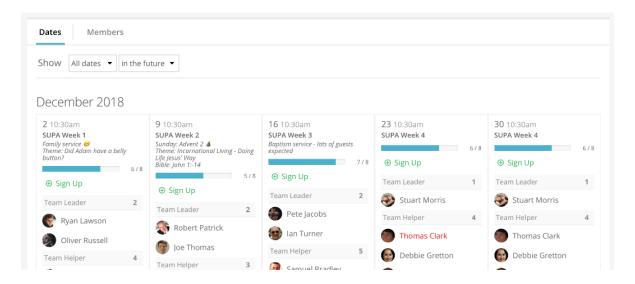
Selecting **Organise swap** enables you to record details of the person with whom you have already decided to swap with – you shouldn't "inflict" a swap on someone! You can only swap with another available rota member. Select their name from the **Swap with** drop-down list, and then select details of any **Return swap** you may have agreed. Saving the changes will update the rota immediately, adding swapped people to rota dates with an 'accepted' status.



After adding a rota swap, an email confirmation will be sent to *you* confirming you are no longer serving on that date, and to the *swapee* confirming to them that they are now serving on that date,

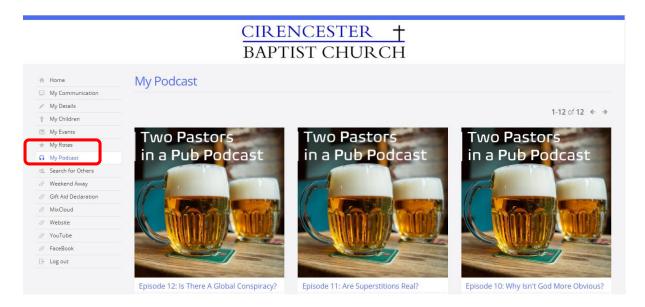
including a note of their roles on that date. A further email is sent to the *ministry overseer* advising the swap transaction.

Some rotas might have sign-up enabled – you'll see a **Sign-Up** button at the top of each rota date with spaces available...



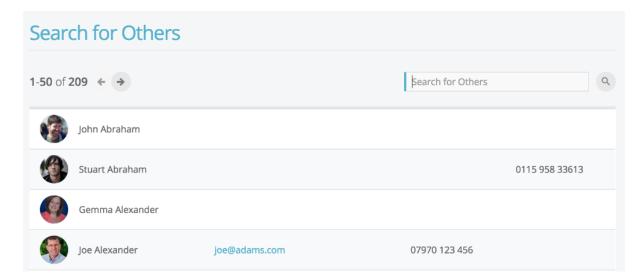
...so, overseers might publish empty or part-completed rotas, and then invite ministry members to sign up to future dates based on their availability. It's a great way of recruiting and helps team members too because they can manage their serving commitments based on their known availability. You can sign up to a rota date whenever you see **Sign up** on the rota.

8. My Podcast



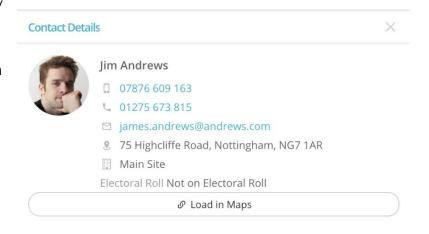
9. Search for Others

This is our church's contact directory provided for church members only.

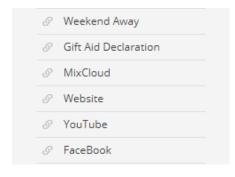


Remember, you'll only be able to view the contact details of others based

on their personal privacy settings, and they'll only be able to see your contact details based on your privacy settings. In the example below, Jim has chosen to set all his contact details visible to others. Clicking on a contact displays a popup contact card.



10. External Links



The remaining items you might possibly see on the My ChurchSuite menu after "Search for Others" are "external links". These are links to websites and resources that we have set up for you.