



Membership Setup Guide

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Quick Startup Guide

When starting with IconCMO, there are three ways to get your membership information into the system.

1. Import your data from another system or existing spreadsheets. For a reasonable fee, we can convert data to import into IconCMO from other systems.
2. Sometimes, organizations can import their data independently if they have a tech-savvy individual familiar with APIs. IconCMO's [API](#) is free to use.
3. The other approach is to enter your records manually. The '[How Do I...](#)' section of this guide explains how to create a household and add individuals to households.

Once the household information is set, you can organize individuals into groups, associate them with specific 'talents,' and set up events for attendance, all of which are described below. You can also assign donor numbers to the households and set up the Donations module, as described in our [Donations Setup Guide](#).

IconCMO Software Concepts and Definitions.

Households and Individuals

Understanding the difference between a Household and an Individual is important and is defined as follows:

- o Definition of a **Household**: A Household is a physical location where people reside, and the name of the household represents the adults who are responsible for the location. It **does NOT** represent an individual. All individuals are listed within the household. Additionally, the household record includes the primary mailing address, alternate address, and phone number (if available), status, email history, and directory inclusion options. There is very little individual information displayed on the household screen.
- o Definition of an **Individual**: An individual is a person who resides at the household location. Every member (individual) of a family or household should have a separate record. The individual record stores all information about that person, including birthdays, marriage dates, personal emails, phone numbers, gender, relationship, groups and talents they belong to, work information, and more.
- o A **Household** example: Mary and Jimmy Jones have three kids: Sarah, John, and Mark. We would have **one** household record named 'Mary and Jimmy Jones', which includes the household's address. Then, there would be **five** individual records, one for each family member.

How does this affect the data input or use of the system?

Example Scenario: The organization wants to send a personalized invitation (by mail or email) to the teenagers about an upcoming event, with labels addressed only to the teenagers, not the parents. In this case, the individuals' records are used instead of the household for labels because

the household is named after the parents. Icon will pull the teenagers' names from their individual records and use the physical addresses from the household record to create the labels.

What is a Communication Group?

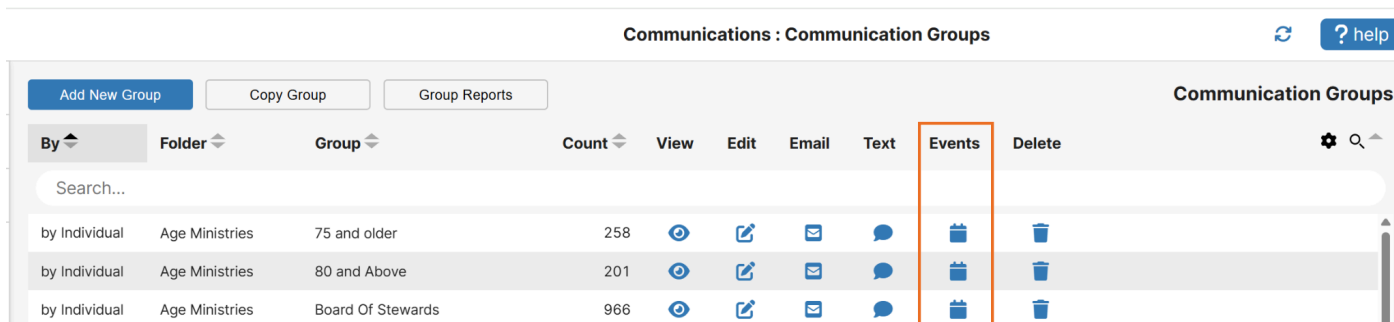
Groups divide individuals into smaller categories to send communications or track attendance for a specific group.

Note about Emails: If multiple individuals have the same email address listed on their records, the system will only send the email once. It will not send duplicates to the same email address.


Difference between Group Events and Attendance

Understanding the difference between Group Events and Attendance:

Group Events are designed for taking attendance for a specific group of individuals. This is completed under Communication: Communication Groups. Choose the group and click the 'Events' icon.



By	Folder	Group	Count	View	Edit	Email	Text	Events	Delete
by Individual	Age Ministries	75 and older	258						
by Individual	Age Ministries	80 and Above	201						
by Individual	Age Ministries	Board Of Stewards	966						

Note: If the Events icon is not visible on the screen, you can choose to display that column by clicking on the gear  icon in the upper right. Then, ensure the 'Events' column is added to the Columns to Display section.

o To track attendance within the group, you must first add the event. To do this, click the 'Events' icon for the appropriate group and choose 'Add New Event' from the Event List drop-down. Then, you can give the event a name and select a date. If the event is recurring, you can choose the frequency and end date. If it is not recurring, choose 'Do Not Repeat.'

Selected Group	80 and Above
Event List	Add New Event
Event Name	Sunday School
Event Date	05/01/2024
Frequency	Weekly
Event End Date	08/29/2024

The most significant difference is that when you set up events, only those in that group will appear to take attendance for, not instead of the entire congregation.

- o Attendance tracks the participation of the entire congregation, typically for weekly services. This is completed under People: Attendance. Attendance can be recorded using individual names, a general headcount, or both.

System Overview

System Settings Overview

o **Settings**→**Preferences**→**Church Membership**

This window has several sections: System Default Values, Modify Contents of a Drop-Down List, Other Membership Preferences, and Add Signature to Donation Statement Style Receipt.

System Default Values

- o This allows you to set the default values for denomination, ethnic origin, language, address label format, city, state, zip code, area code, relationship, and gender. You can also create two custom fields for household records and choose whether to include new households in the directory automatically. Remember to click 'save defaults' once all changes are made.

Modify Contents of a Drop-Down List

- o Allows values to be added or removed from the standard drop-down list. For example, you can add 'Homebound' to the 'Status' drop-down list for individual and household statuses. In other drop-down lists, you can include values such as Relationship, Denomination, Language, Countries, Ethnic Origin, Occupation, Gender, Note Type, and User-Defined fields (created in the System Default Values section).

- **Maintaining or Modifying Drop-Down List Contents:**

- **Adding a new entry:**

1. Select the drop-down list you want to change from the 'Select drop-down list' field.
2. The 'Current name' field will default to 'Add New Entry'.
3. Enter the new entry in the text field 'New / Modified Value.'
4. When finished, press the 'Save New' button.

- **Change an existing entry:**

1. Select the drop-down list you want to change from the 'Select drop-down list' field.
2. Select the entry to change from the 'Current name' drop-down list.
3. Enter the new name in the text field 'New / Modified Value.'
4. Press the 'Modify Drop-down' button. This will change the old name to the new value unless the new value also exists in the drop-down list.
5. When a new, modified value already exists, any individuals with the old name will be updated to the new modified value, and the old name will be removed.

- **Delete an existing entry:**

1. Select the drop-down list you want to change from the 'Select Drop-Down List' field.
2. Select the entry to be deleted from the 'Current name' field, then enter a replacement value in the edit box titled 'New/Modified Value.'
3. Press the button 'Delete Drop-down.'
4. When an individual record's value matches the value to be deleted, the deleted entry will be replaced with the new or modified value.
5. The replacement value entered must exist in the drop-down list you're working with.

Other Membership Preferences

o Allows changes to phone and email types and special events. Phone and email types such as 'mobile' or 'work' can be added. Special events are milestone dates, such as birthdays, weddings, confirmations, or anniversaries. Each button launches a sub-screen, as noted below. The church's system administrator should set up these settings, as they affect the entire system. All of these settings will be displayed on individual records to enter their personal information.

- Maintaining Phone Types:

- Adding a new Phone Type:

1. Enter the name into the Phone Name field.
2. Press the 'Save' button after making your changes.

- Changing a Phone Type:

1. Select a phone name from the list of phone names.
2. Change the values.
3. Click 'Save'.

- Deleting a Phone Type:

1. Select a phone name from the phone list.
2. Click 'Delete'. A message will appear, reminding you that this phone assignment will be removed from any household or individual using it.
3. You then have the chance to cancel or continue the request.

- Maintaining Email Types:

- Adding, changing, and removing email names – These options work like the phone options above.

- Maintaining Special Events:

- Add a new event:

1. Press the 'Clear Fields' button to clear out the contents of all the fields.
2. Enter the name of the new event in the 'Name' field. The event name can contain a maximum of 25 characters.

3. Add up to six additional fields to retain information about the event that you want your users to enter.
4. Give each field a name by typing the field name in the edit field.
5. Press the 'Save' button to add the new event to the system.

- Change an existing event:

1. Select the event to change from the list of events on the left.
2. Modify the name of the event or the names of the six user-defined fields.
3. Press the 'Save' button after completing the changes.

- Delete an existing event:

1. Select an event to be removed from the list of events on the left.
2. Press the 'Delete' button. A message will appear, reminding you that the event will also be removed from any individuals to whom it has been assigned.
3. Press 'Ok' to delete.

Note: The system has five default Special Events that cannot be removed: Birth, Baptism, Confirmation, Marriage, and Deceased.

o Settings→ Preferences→ Personal

This screen has several sections: System-Wide Preferences, Membership & Donation Preferences, Accounting Preferences, Personal Security, User Email, and Other Personal Preferences.

Note: This screen affects only the logged-in user and not other users on the system.

System-Wide Preferences

- o A user can set the fiscal year they want to work in, the date format, and the background image displayed in the system, and switch the accounting menu sections on or off depending on whether or not they wish to see them displayed in the main menu of IconCMO.

Membership & Donation Preferences

- o Users can set the default status code and country for data entry purposes.

Accounting Preferences

- o Allows the user to set a default date and fund for the accounting side of the system (ie, General Ledger, Banking, AR, AP, Payroll).

Personal Security

- o Allows the user to change their current password. To proceed, the user must know their current password. If they don't know their current password, they must use the 'Forgot My Password' feature on the login screen.

User Email

- o Allows the user to change their current password or email. It is **very important** for each user to have their current email address stored in the system in case they ever need to reset their password. Icon Systems' employees do not have access to any passwords or the ability to change users' email addresses. Password resets are sent via email.

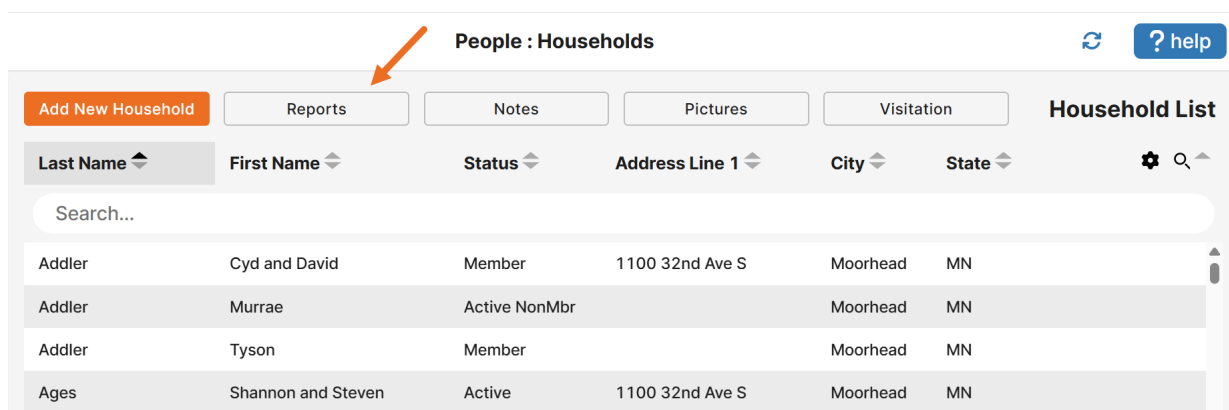
Other Personal Preferences

- o Allows the user to turn the 'Auto Add' feature on or off to automatically add individual records when a household record is created, thus saving considerable time in creating the necessary individual records. When turned on, this feature automatically creates individual records for those people when there is either an ampersand (&) or the word 'and' between their first names. For example, John and Mary or John & Mary could be used when creating the household record, and the system will automatically create an individual 'John' record and an individual 'Mary' record. This saves time, as you only have to add individual records for the children or other household members.
- o **Settings**→**Setup**→**Information**

This screen allows you to enter the organization's name, address, and contact information, which will be used throughout the system. It also allows you to upload a logo, which must be in JPEG format, with a minimum size of 75 x 75 pixels and a maximum size of 150 x 150 pixels.

Running Reports, Exports, Labels, or Graphs

- o Many screens on the membership side of the system will give you a list of reports for that module. When you decide what to report on, go to the area where you input that information. Below is an example of where to find the reports for information on Households.

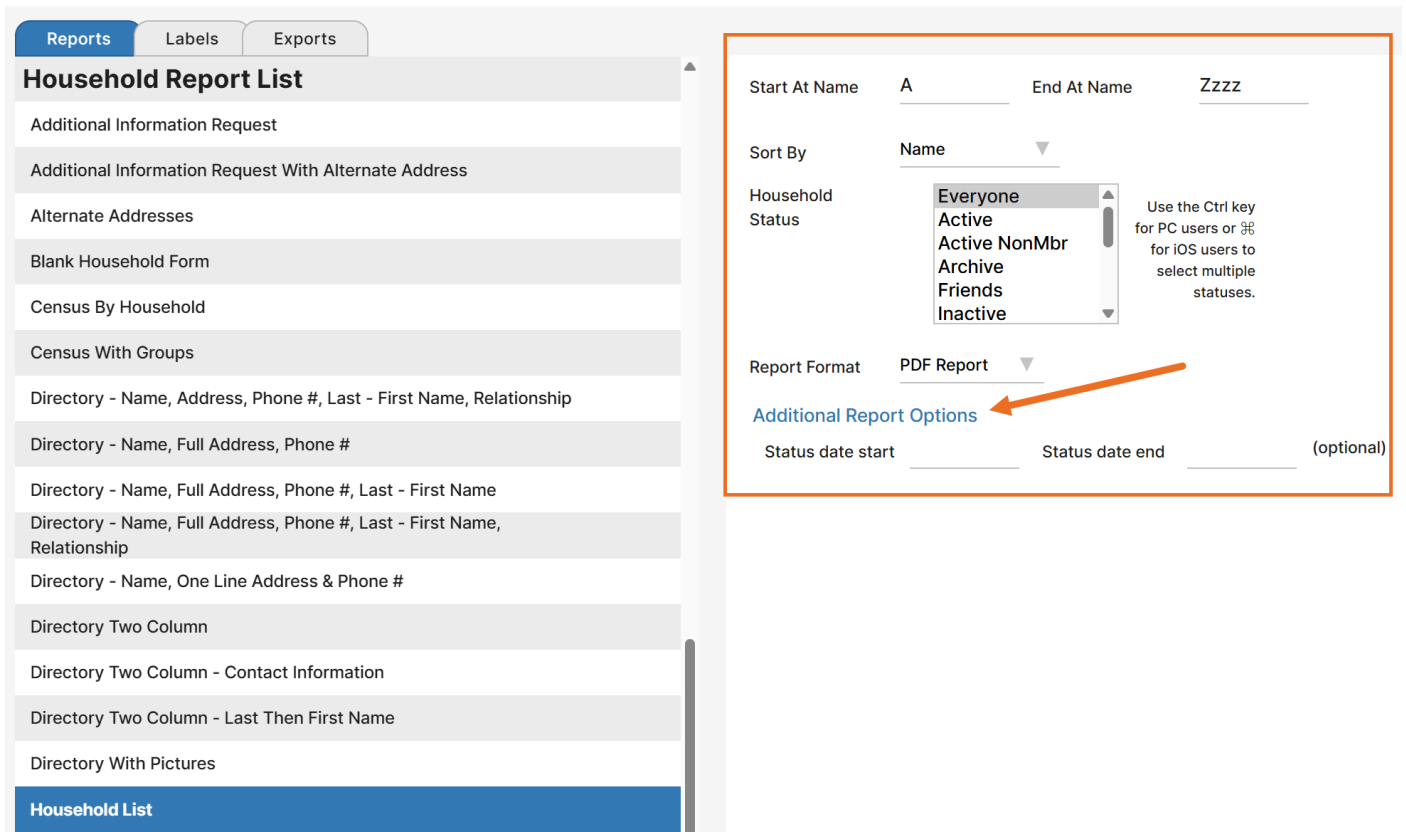


The screenshot shows the 'People : Households' interface. At the top, there are tabs for 'Add New Household', 'Reports', 'Notes', 'Pictures', and 'Visitation'. The 'Reports' tab is selected, and an orange arrow points to it. To the right of the tabs is a 'Household List' button. Below the tabs is a search bar with the text 'Search...'. Below the search bar is a table with the following data:

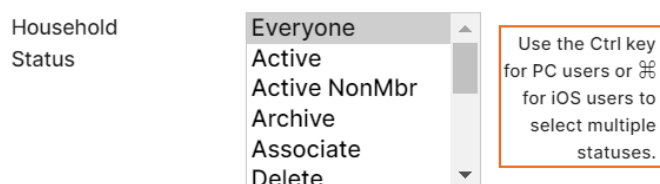
Last Name	First Name	Status	Address Line 1	City	State
Addler	Cyd and David	Member	1100 32nd Ave S	Moorhead	MN
Addler	Murrae	Active NonMbr		Moorhead	MN
Addler	Tyson	Member		Moorhead	MN
Ages	Shannon and Steven	Active	1100 32nd Ave S	Moorhead	MN

- o When selected, the report list appears on the left side of the screen. The 'Household List' report is highlighted and selected in the image below. When you choose a report, the filtering criteria for that report will appear on the right. Be sure to look for an 'Additional Report Options' link, as indicated by the arrow in the image below. Click the link to view additional report criteria options. Set the criteria for the report and the output format (PDF, Excel, HTML) as shown. Then click the 'Show Report' button to run the report. If you attempt to output the report to PDF and it doesn't appear on-screen, check your browser settings to make sure the pop upblockers are

not blocking the reports from IconCMO. If you click the arrow on the 'Show Report' button, there is an option to email the report.



o Various report screens will also allow you to select multiple status codes. This is indicated by a message that reads, 'Use the Ctrl key to select multiple statuses,' and is illustrated below. With the Ctrl key held down, use the mouse to click on the status codes you wish to include. After making status selections, release the Ctrl key and run the report.



Note: When running reports, it's beneficial to understand what kind of data you are seeking. For example, if you want a birthday report, go to the individual reports, not the household reports. Why? Because households don't have birthdays, individual people do.

Similarly, if you were looking for a directory or address labels, you would go to household reports, as directories and household reports contain the address and household information, along with some individual details.

o Additionally, you can run custom reports from several screens in the system as well. The images in the examples below are from the People → Individuals screen.

Individual List

[Add New Household](#)
[Reports](#)
[Notes](#)
[Pictures](#)
[Archives](#)
[Visitation](#)

[Last Name](#)
[First Name](#)
[Preferred](#)
[Status](#)
[Personal Phone](#)
[Personal Email](#)
[Age](#)
[Donor #](#)

Reset to Defaults CLOSE

▼ Columns to Display:

Add a column... [Last Name](#) [First Name](#) [Preferred](#) [Status](#) [Personal Phone](#) [Personal Email](#) [Age](#) [Donor #](#)

Filter: +

▼ Print and Export:

Title: Active Youth PDF [Print](#)

Favorites: [Create new favorite with current settings...](#)

- o The title is populated by default; however, you can change the name by overwriting the text in the field. You can also choose the format in which to display the report: PDF, HTML, or Excel. The report will display the information on your screen based on the columns you have selected to display and the filters you have added.
- o The system remembers your selections when you exit those screens so that the same selections will be displayed the next time you visit them. There is a 'Reset to Defaults' option that will clear all previously selected filters and criteria from that screen.
- o Creating a label or an export on the system is very similar to how reports are created in the Reports screens of each module. Choose the tab with the word 'Exports' or 'Labels,' and you will see a list on the left where you can choose one of the exports or labels. Then, the filtering criteria will be displayed on the right. Once your criteria are selected, click 'Show Report'. For Exports, you can either select 'Excel' or 'tab-delimited' for the file type using the drop-down list that is just below the status box. For Labels, you can choose 1 across, 2 across, or 3 across. You can even select the starting position of the label. Just be sure to click on the links for additional options.

Reports **Labels** Exports

Individual Label List

- Alternate Addresses
- Anniversary
- Archive List
- Birthday
- Individual List
- Individuals Who Opted Out Of Emails
- Special Dates
- Special Dates - Missing
- Special Dates Archived

Household Label List

- Alternate Addresses**
- Household Envelopes
- Household List
- Household Phone List
- User Defined Fields - Print Field One
- User Defined Fields - Print Field Two
- Households with Email Addresses

Household Status: **Everyone**

- Active
- Active NonMbr
- Associate
- Delete
- Friend

Use the Ctrl key for PC users or ⌘ for iOS users to select multiple statuses.

[Open Additional Label Options](#)

Use upper case

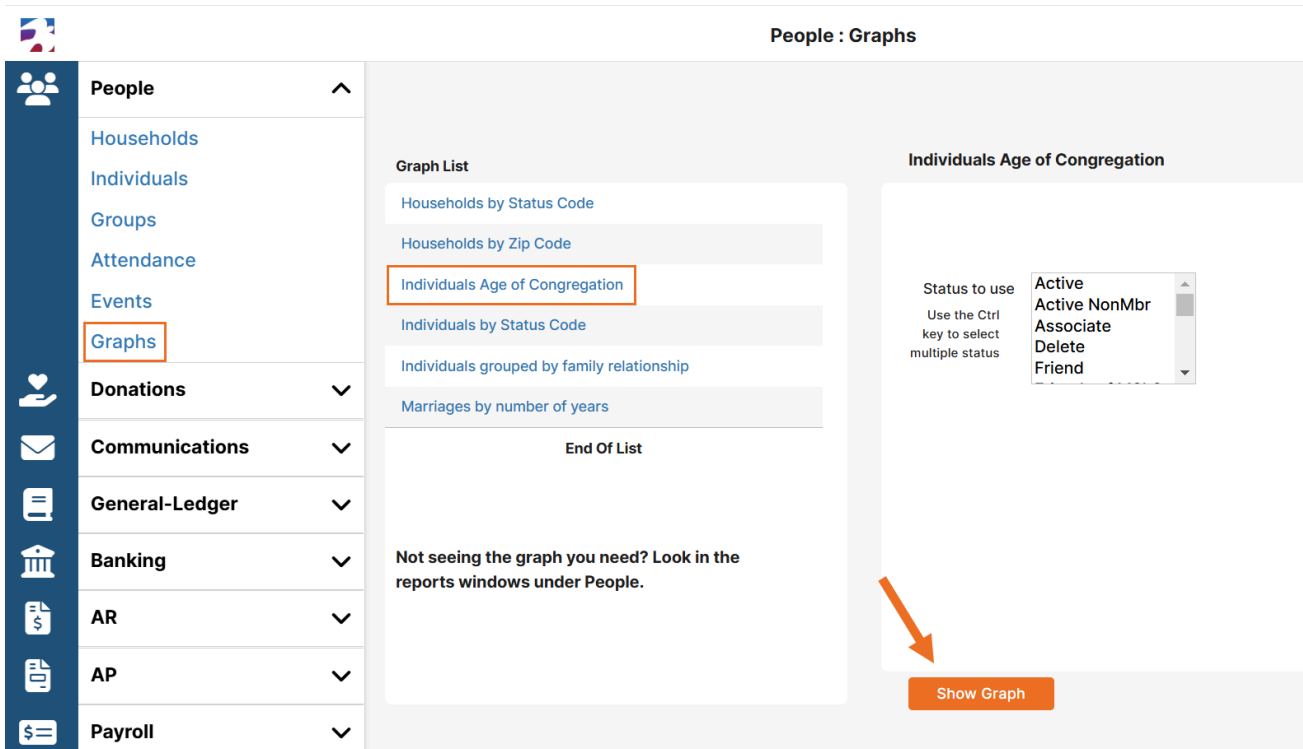
Label type: 3 Across

[Choose Starting Label Position](#)

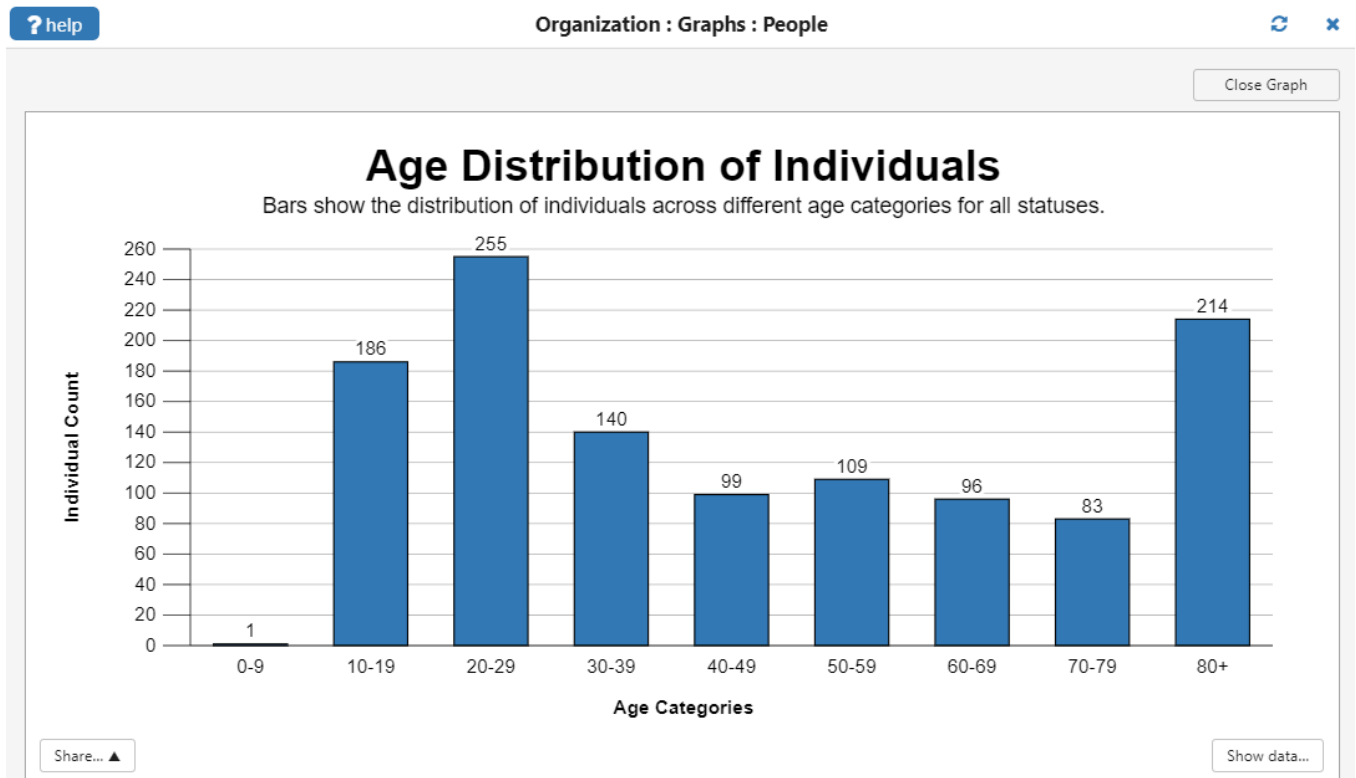
- Position 1
- Position 2
- Position 3
- Position 4
- Position 5
- Position 6
- Position 7
- Position 8
- Position 9
- Position 10
- Position 11
- Position 12
- Position 13
- Position 14
- Position 15
- Position 16
- Position 17
- Position 18
- Position 19
- Position 20
- Position 21
- Position 22
- Position 23
- Position 24
- Position 25
- Position 26
- Position 27
- Position 28
- Position 29
- Position 30

[Show Report](#)

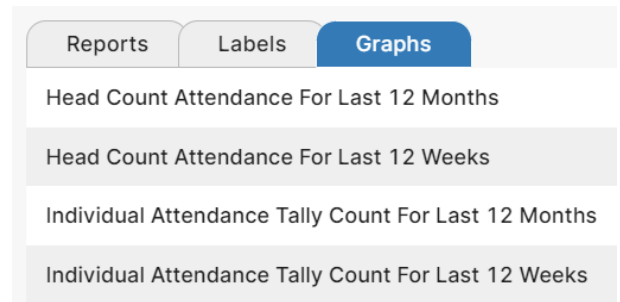
o Graphs are run in the same way as reports. Graphs can be found under each respective module. Graphs for people are under People: Graphs. Graphs for Donations are under Donations: Graphs, and Graphs for accounting are under General-Ledger: Graphs. Below is an illustration of the 'People' graph screen, which shows the 'Individuals Age of Congregation' graph.



o After you click the 'Show Graph' button, the graph will appear on the screen, as seen below. On this screen, you will find several options. Under 'Share,' you can either download the graph as an image or a PDF, or you can copy the image to your clipboard and attach the file to a newsletter or email.



- o Some of the graphs, such as attendance graphs, can be found on the respective reports screen in their own tab.



How Do I...?

Add an Individual or a Household

The following are helpful hints regarding household field definitions. You should consider them when adding this type of data to your system. Consistency is the key to good data entry and accurate reports.


- o Title:
 - If Married Couple, Title = Mr. & Mrs. or Mr. & Dr.
 - If Single Person, Title = Mr. or Mrs.
 - Many people will leave this field blank.
- o First Name:
 - If Married Couple, First Name = John & Mary or Mary & John.
 - If Single Person, First Name = John or Mary.
 - This field is never blank. It must contain the Head(s) of households (i.e., the responsible parties in the household).
- o Last Name:
 - If Married Couple with the same last name, Last Name = Anderson.
 - If Married Couple with different last names, Last Name = Anderson(Smith). The primary last name of the household would be Anderson, and the Secondary name would be Smith.
 - If the Married Couple has different last names and the one is hyphenated, the last name Smith after the name Anderson: Last Name = 'Anderson(-Smith).' The parentheses are necessary to distinguish that one person does not hyphenate their name.
 - If the Married Couple both hyphenate their last names, Last Name = Anderson-Smith.
- o Status:
 - The status field is used to designate different types of households. You can add as many statuses as needed by going to Settings → Preferences → Church Membership. On the right side, locate the section labeled Modify the Contents of a Drop-Down List. In the field 'Select Drop-Down List,' select 'Status.' Enter the status you wish to add to the New / Modified Value and click the 'Save New' button.
 - Do not add a status code where an individual can fall into multiple codes. For example, don't add 'Choir' since a choir member can also be an 'Active Member.' Don't add 'Employee' since an employee could have a status of 'Active Member' or 'Friend.' Choir members belong to Groups.
- o Status Date:
 - The Status Date can be used in several ways. Most use that date field as the first time someone came to church, or the date they became a member.

Note: IconCMO has a feature that, when enabled, automatically adds individual records for the primary individuals named in the household record. Please refer to the [System Overview](#) to understand how this works.

In our example, we added a household for Susie and Sam Sample, so we included both names in the First Name field. When we save the household, individual records for both people are added. Click 'Add/View Individuals' to add additional individuals to the household, such as children.

People : Households

Add Succeeded



Title	First Name * Susie & Same	Last Name * Sample	Status Active
Status Date	Country Code	Phone	<input type="checkbox"/> Unlisted
08/08/2025	1		<input type="checkbox"/> Include in Directory

Include Address In Directory

Primary Address Alternate Address

L1 - Mail To

L2 - Addr Line1

L3 - Addr Line2

L4 - City *

State * Zip

L5 - Country

Carrier Rte Addr Zone

[Print Envelope](#) [View Map](#) [Driving Instructions](#)

[Print Envelope with Return Address](#) [Print Single Label](#)

Individual	Age	Relationship
Same Sample		Other
Susie Sample		Other

Add/View Individuals	Add Notes	Email History
More Information	Print Census	Archive
Go To Household List	View Donations	
Modify - Save	Clear - Add New	

Last Updated

2025 Donor Number

* Required Field

o Single-Person Household: If you add a new person to the system who is the only individual in their household, the household record would be added first, reflecting the physical residence, and then one individual record would be added representing the individual living at that location.

o You can watch this [video](#) on how to add a household to IconCMO.

Add a Household Picture for the Pictorial Directory

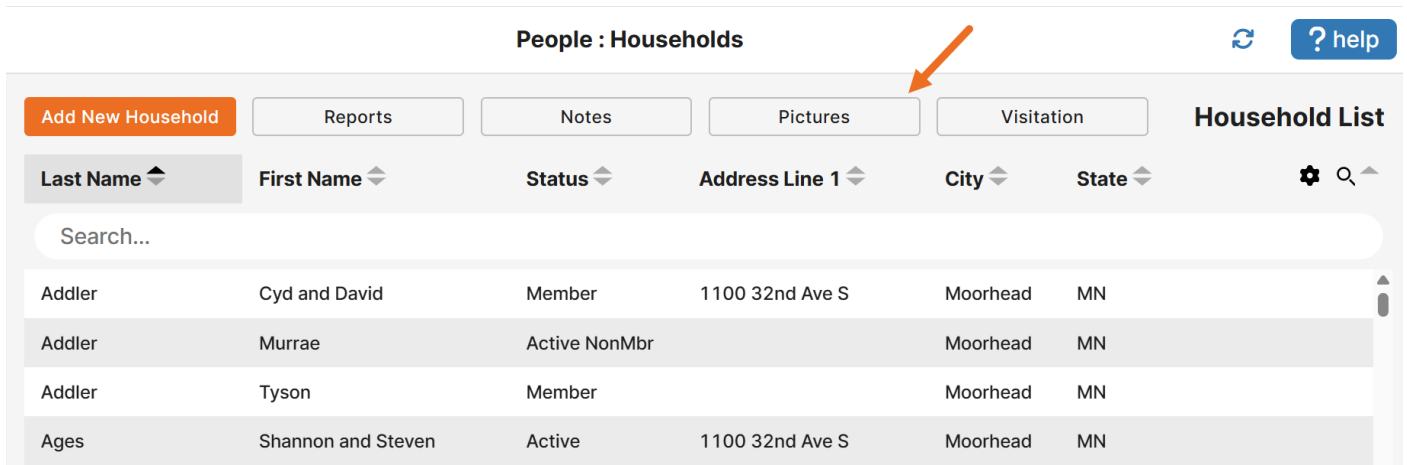
You can access the screen to upload household photos in two ways. The screen works the same way in both instances.

o In the household record, you can click the image in the upper left corner of the screen. If no household picture is currently in the system, it will appear as shown below.

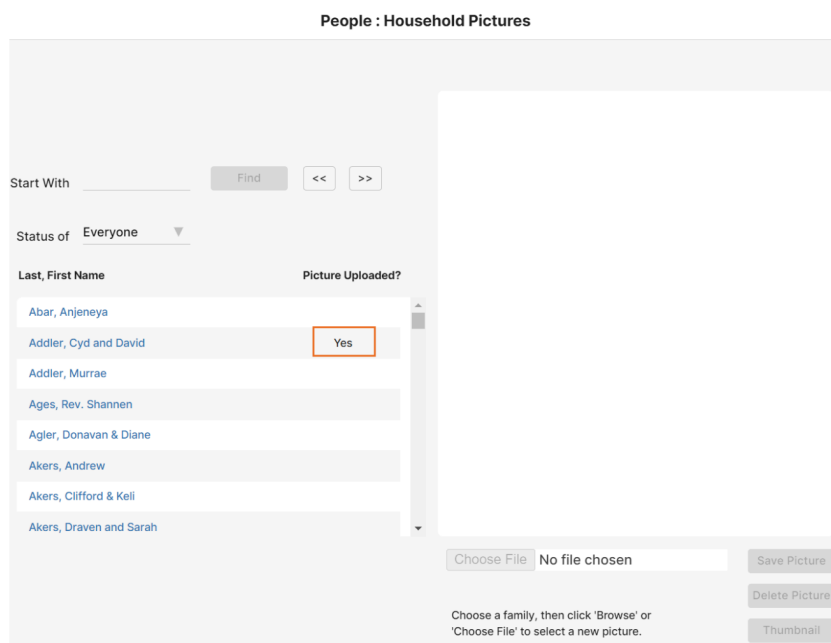
o Hover your mouse over the picture and click on it. The 'Household Pictures' screen will appear.

o Another means of access is by going to the People → Households screen. At the top of the household screen, there is a 'Pictures' button.





- o This will bring you to the household pictures screen, as seen below.
- o Any household with a picture will have a 'Yes' in the 'Picture Uploaded?' column.



1. Select the household on the left to upload a picture.
2. Click 'Choose File' and locate the picture on your computer.
3. Click 'Save Picture'. The system will upload the picture in a few seconds. Once it has, you should see the uploaded image on the right.
4. You can delete a picture by choosing the household on the left and clicking 'Delete Picture'.

Note: This same process can be done to upload individual photos under the Individuals screen.

Add an Individual

An individual must be attached to a household. Therefore, you cannot add an individual unless the household exists first. If you need to add a household first, please refer to the topic 'Adding a Household'.

1. Go to People → Households.
2. Click on the household name to which you wish to add an individual.

3. Click 'Add/View Individuals' at the bottom right to open the Individual Form.
4. Enter the Individual's first and last name. Other data that can be entered includes relationships within the household, gender, denomination, language, ethnic origin, status, and preferred and maiden names.
5. Click 'Save Individual' to save the record. The individual's name will appear on the left side, alongside the names of other individuals in the household, as shown below.
6. To add another new individual, press 'Clear-Add New Individual' and follow the above steps for the next individual in this same household. It is not necessary to go back to the household list unless the individual you're adding belongs to a different household.

The Agler Family

In change mode

Individual Age

Donny

Diane

Title _____ Mail To Diane Agler [Edit Picture](#)

First Name * Diane Relationship Wife

Middle Name _____ Gender Female Denomination Methodist

Last Name * Agler Status Active 1st Language English

Preferred _____ Status Date 07/24/2025 2nd Language Spanish

Maiden Name _____ Head of Household Ethnic Origin Caucasian

Modify - Save Individual Clear - Add New Individual Archive Individual * Required Field

o You can also watch this [video](#) on how to add an individual to IconCMO.

Add, Update, or Delete an Individual's Information

Generally, updating an individual's information in IconCMO is done in one place: under the individual record.

1. Go to People → Individuals.
2. Click the individual for whom you wish to modify data.
3. Select the data you want to modify. You can change any of the information mentioned in the 'Add individuals' process or most of the options seen in the orange box in the image below (Special Events, Phone Numbers, Email Addresses, Communication Groups, General Attendance, Registration, Individual Transfer, Alternate Address, Work Information, Secondary Household, Allergies, or Guardians).
 - General Attendance can be viewed on this screen, but cannot be modified. To modify attendance, go to the People→ Attendance.
 - Registration can be viewed on this screen, but cannot be modified. The entries on this screen come from an individual's registration for an event created in the Events module.
 - Background Checks gives you an integrated link to log into Protect My Ministry directly from this screen once you have signed up for it. If you have never signed up, this screen will display a message to find out more by following a link to our Partners & Integrations window.
 - Allergies & Guardians will display in the Check-In Kiosk of the Events module.

People : Individuals

In change mode

Title	Mail To	Shannon Ages	Edit Picture
First Name * Shannon	Relationship	Wife	
Middle Name	Gender	Female	Denomination
Last Name * Ages	Status	Active	1st Language
Preferred	Status Date	05/11/2023	2nd Language
Maiden Name	Head of Household	<input type="checkbox"/>	Ethnic Origin
			Not Selected

Modify - Save Individual
Clear - Add New Individual
Archive Individual
* Required Field

- Special Events
- Phone Numbers
- Email Addresses
- Communication Groups
- General Attendance
- Registration
- Individual Transfer
- Alternate Address
- Work Information
- Secondary Household
- Background Checks
- Allergies
- Guardians

Name

Birth

Baptism

Confirmation

Marriage

Deceased

Received by

Removed by

Date

MM DD YYYY

Location

Save Birth
Delete Event

o Depending on which option you choose from the list outlined in the picture above, the information in the area to the right will change, allowing you to enter the appropriate data. For many options, a save button will also appear in the area to the right for you to click once you are done adding or changing the data. If you wish to delete the data, many options use the delete button in the same area. Don't confuse the save or delete button in the bottom portion of this screen with the 'Modify- Save Individual' or 'Archive Individual' buttons for the primary individual form at the top of this screen, or you may not get the desired results

Note: You can customize many of the drop-down menus, such as Special Events, Phone Name, Email Name, and Occupation, by going to Settings→ Preferences→ Church Membership→ Modify Contents of a Drop-Down List, Maintain Phone & Email Types, or Maintain Special Event Types.

Add Notes to an Individual

There are two ways to access the screen to add individual notes. The screen works the same way in both instances.

1. Go to People: Individuals. Click 'Notes' at the top of the window, or open a specific individual record and click 'Add Notes' on the left. (If notes exist, the button will say 'Add/View Notes.'
2. Click on the plus sign to the left of the individual's name for whom you want to add a note. A new window will open, allowing you to document the note.
3. Type your note and click 'Close' to complete the note. Once you are back in the main window, you can enter a note type and dates.
4. To add note types, go to Settings: Preferences: Church Membership. Choose the list for Note Type under 'Modify Contents of a Drop-Down List.'
5. To edit a note, click on its text to open it and make changes. To delete a note, click on the trash can icon on the left side of the note.

Individual Notes List

Name Notes Note Type

Search...

+ Johnson, Joe		
+ Jones, Lena	Able to teach or assist with Sunday School	Generic Note
+ Jones, Marsha		
+ Jones, Ole		
+ Little, Brad	Adult dependent - ill and housebound	Generic Note
+ Little, Robert		
+ Little, Yvonne		
+ Lovejoy Household, Cindy		
+ Lovejoy, Cindy		
+ McDonald, Betty	Has a severe peanut allergy	Generic Note
+ McDonald, Betty	Available to chaperone youth camp	Generic Note
+ McDonald, Jack		
+ Moses, Frank		

Note: Household Notes are a bit different. Select your household from the list on the left. Type your notes in the box to the right, then click the 'Save Notes' button near the bottom of the window. There is only one note box per household, and no note types to label them.

Record children in multiple household situations

The Secondary Household feature identifies individuals who belong to more than one household. The most common scenario is when a child of divorced parents spends time at both houses.

1. On the individual record, locate the Secondary Household tab. The Primary Household to which the individual belongs will be listed on the right.
2. To add a secondary household, enter a few letters of the last name and click 'Find.'
3. Select the household from the list below, and that household name will appear on the right under Secondary Household. You can add multiple Secondary Households.
4. Make sure to click 'Save Changes.'

o To remove a Secondary Household from the list, click on the household name.

o In the primary household record, you will see a checkmark under the 'Linked' column next to the individual, denoting another household linked to that particular individual.

o You will also notice in any secondary household that the individual is listed in the family members box, and under the 'Linked' column, you will see the last name of the primary household. When you click on the name under the 'Individual' column for the linked individual, the system will bring you back to that individual's record within the primary household.

Individual	Age	Relationship	Linked
Adam Thomas		Other	
Mary Thomas		Other	
Shannon Ages		Wife	Ages

Additional Report Options

Individual Options:

Listing options List Households Once ▼

Print child's last name if different

Print secondary households

Use alternate address

o When printing directories, an individual linked to multiple households can be displayed under all linked households when the 'Print secondary household' option is selected under 'More Settings' in the report criteria. You may also choose to print the child's last name (or not) if it differs from the household's last name.

Note: Links to secondary households are removed when the households or linked individuals are archived. To retain this information in the archives, you will have to enter it manually in the notes.

Transfer or Move an Individual from One Household to Another

This function is used to relocate someone from their current household to a new one.

- o If transferring to another household that already exists in the system:
 1. Go to People → Individuals.
 2. Click on the individual you wish to transfer.
 3. In the list of data entry options on the bottom left, select 'Individual Transfer'.
 4. In the white box next to the 'Find' button, enter the Last Name of the household to which you wish to transfer the individual, and then click the 'Find' button.
 5. Click on the Last Name of the Household you wish to transfer the individual to.
 6. Click 'Transfer Individual'.

o If the individual is moving into a household that does not yet exist:

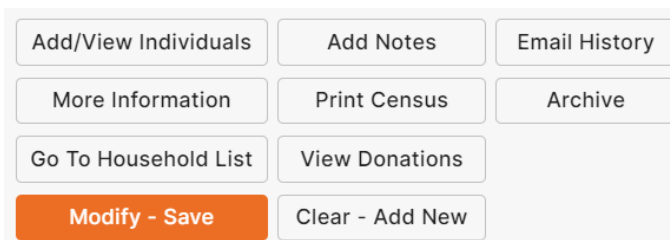
1. Go to People → Individuals.
 2. Click on the individual you wish to transfer.
 3. In the list of data entry options on the bottom left, select 'Individual Transfer'.
 4. Click 'Create New Household'.
- A new household will automatically be created based on the individual's name, and the individual will be moved into and out of the original household.
 - All information about that individual, including groups, attendance, and giving records, will remain with the individual and transfer to the new household.

Recording Deceased or Transferred People

There are two ways of recording deceased individuals, depending on your situation.

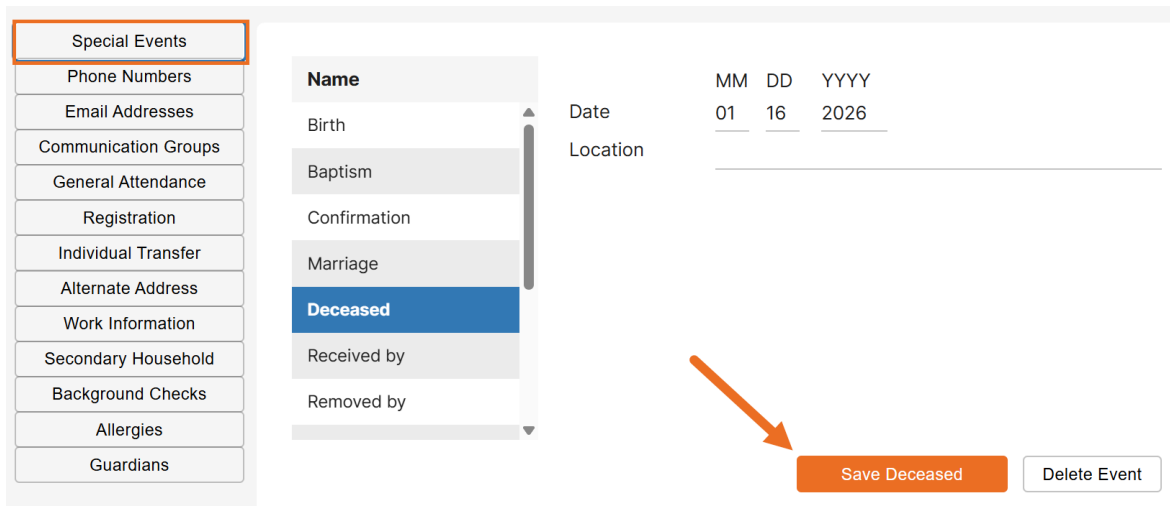
o If the person is the only individual in the household:

1. First, check whether any donations are attached to the deceased individual or their household.
2. If there are, you will want to go to Donations → Statements and print two copies of the statement for that household. One copy should be for the church records, and one should be mailed to the person handling the individual's estate.
3. Since this is the last person in the household, you can archive the entire household. Go to People → Households, locate the household, and click on it to view the record.
4. Click 'Archive' at the bottom right of the Household screen.
5. A pop-up message will ask you to enter a reason for archiving the individual. Enter 'Deceased.'
6. Click 'Archive.'



o If the household the deceased is in has other individuals in it:

1. Go to People → Individuals, locate the deceased individual, and click on it to open their record.
2. Add a deceased date for the individual under their special events.



3. Once this is added, click the 'Archive Individual' button.
4. A pop-up message will ask you to enter a reason for archiving the individual. Enter 'Deceased.'
5. Click 'Archive.' When you're done, the household will still exist, but that specific individual will no longer appear in the household.

o The information will be retained, and the individual can be unarchived if needed.

1. Go to People → Individuals
2. Click 'Archives' at the top.
3. Locate the desired individual.
4. Click on the record to open.
5. Choose 'Unarchive' in the bottom left corner.

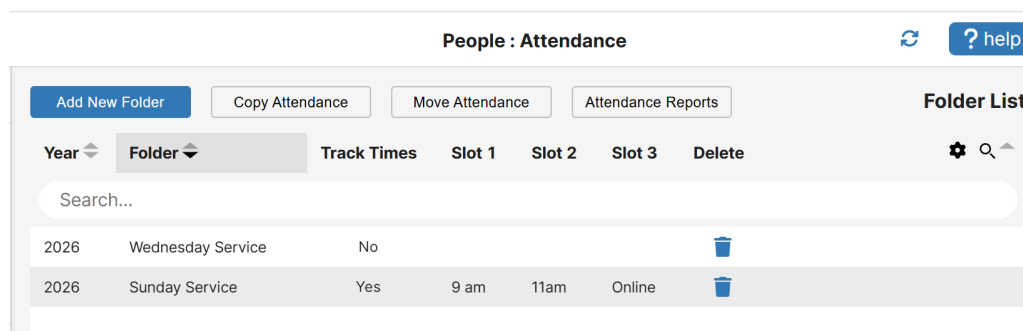
- You can delete individuals once they are in the archives; however, we don't recommend deleting individuals unless they were entered into the system in complete error.

Note: Archived individuals don't count against your household count for pricing, so you can have as many archived records as necessary.



Taking General Attendance

To start, folders and dates must be set up first. The top of the window allows you to add folders and set up time tracking if desired.



Recording Attendance: Once folders are set up goto the bottom of the window to add dates. Click 'Add Date' to add a date to record who attended.

Date	Description	9 am	11 am	Online	HC 9 am	HC 11 am	HC Online	Delete
03/15/2026	Sunday Service	27	34	13	0	0	0	
03/08/2026	Sunday Service	26	46	7	0	0	0	
03/01/2026	Sunday Service	9	0	0	0	0	0	
02/22/2026	Sunday Service	72	115	39	0	0	0	
02/15/2026	Sunday Service	33	49	7	0	0	0	
02/08/2026	Sunday Service	72	142	39	0	0	0	
02/01/2026	Sunday Service	67	105	47	0	0	0	

The number shown in blue is the total number of individuals marked as having attended that event. If attendance has not been recorded, this number would be zero. Clicking on this number under the appropriate time slot for any date will populate the individuals' list for you to mark who has attended.

Click the checkbox under the correct time(s) for each individual who attended. If you remove the check, the box will return to unattended. Your selections will save automatically.

At the bottom of the screen, under the column for each time, a running total of the number of individuals you have marked as attended will be displayed.

Headcount attendance is entered by clicking the number under the Head Count column (abbreviated with HC). Type the number you want to record, and it will automatically save.

Add A Group

1. Go to Communications: Communication Groups.
2. Click 'Add New Group' at the top of the screen.
3. This will create a brand new line in the Groups list. Overwrite the text to enter the folder to which the group belongs and assign a name to the group. The default is to place all groups into a folder named 'Folder' and assign them a name with a group number, like 'New Group 61.'

By	Folder	Group	Count	View	Edit	Email	Text	Events	Delete
by Individual	Age Ministries	75 and older	258						
by Individual	Age Ministries	80 and Above	201						
by Individual	Age Ministries	Board Of Stewards	966						
by Individual	Age Ministries	Children's Ministries	3						
by Individual	Age Ministries	College Students	20						
by Individual	Age Ministries	Cradle Roll ALL	21						

o Naming the Group Leader and marking the group as Private or as a Talent are additional options.

1. Group Leader defaults to 'No Leader' but can be overwritten.
2. To change a group to Private, click on the 'No' button, which toggles it to 'Yes'. Marking a group as private would prevent the individual from seeing that they are a part of the group when viewing their information in the Member Portal.

Assign Individuals to Groups

Once groups have been created, individuals can be assigned to them. There are two ways to do this.

o From the Communication Groups window:

Communications : Communication Groups ? help

Add New Group
Copy Group
Group Reports
Communication Groups

By	Folder	Group	Count	View	Edit	Email	Text	Events	Delete
Search...									
by Individual	Age Ministries	75 and older	258						
by Individual	Age Ministries	80 and Above	201						
by Individual	Age Ministries	Board Of Stewards	966						
by Individual	Age Ministries	Children's Ministries	3						
by Individual	Age Ministries	College Students	20						
by Individual	Age Ministries	Cradle Roll ALL	21						

1. Once groups and folders have been added, you can add group members by clicking the icon in the 'Edit' column for any given group. This will launch a new screen.
2. Use the checkboxes to add or remove members from the group.
3. You can also use the filters and/or the "Assign All" and "Remove All" buttons to quickly add or remove individuals.
4. Click 'Close' to exit the edit window.

Folder Edit Individual Group List

List

[Enter "True" in search bar to filter for checked records or Click Here](#)

	Last Name	First Name	Status	Age	Household Name
<input type="checkbox"/>	Abramovic	Tychicia	Member	26	William & Liz Audette
<input checked="" type="checkbox"/>	Addler	Ashley	Member		Cyd and David Addler
<input checked="" type="checkbox"/>	Addler	Cyd	Member	39	Cyd and David Addler
<input type="checkbox"/>	Addler	David	Member		Cyd and David Addler
<input type="checkbox"/>	Addler	Murrae	Active NonMbr	31	Murrae Addler
<input checked="" type="checkbox"/>	Addler	Sarah	Member		Cyd and David Addler
<input type="checkbox"/>	Addler	Tyson	Member		Cyd and David Addler
<input checked="" type="checkbox"/>	Ages	Shannon	Active		Shannon and Steven Ages
<input type="checkbox"/>	Ages	Steven	Active		Shannon and Steven Ages
<input type="checkbox"/>	Agler	Donavan	Archive		Donavan & Diane Agler
<input checked="" type="checkbox"/>	Akers	Andrew	Active	19	Rev. Draven Akers
<input checked="" type="checkbox"/>	Akers	Clifford	Active	32	Clifford & Keli Akers
<input type="checkbox"/>	Akers	Draven	Member	54	Draven and Sarah Akers
<input checked="" type="checkbox"/>	Akers	Keli	Active	34	Clifford & Keli Akers
<input type="checkbox"/>	Akers	Sarah	Member	54	Draven and Sarah Akers

Count: 7 Displayed: 1165

Remove All
Add All
Close

- You can sort and filter the individuals on the screen and choose what information to display.

1. To add additional columns, click the gear icon and check the items you wish to add.

2. Use the up and down arrows by the column headers to sort/view the individual columns.

3. To add additional filter options:

- Click the '+' (plus/add) button next to 'Filter.'
- Select the criteria you wish to search by, such as age
- Add the specification of 'equal to,' 'greater than,' 'less than,' 'is between,' etc.
- Type in the specific criteria, such as '5' and '18' in the example below.

- You can remove filters on a particular search by clicking the '-' (minus/remove) button next to the filter you wish to remove.

5. Once you have the filter set up the way you like, you can use the 'Add All' button, which was previously discussed, to add individuals to the group in bulk based on the chosen criteria.

o From the individual's record:

- Go to People → Individuals
- Click on the record of the individual you want to open.

- Once the individual record is open, click on the 'Communication Groups' tab on the bottom half of the screen (as outlined below).
- Select the Folder and Group to which you want to add the individual.

- Click 'Add to Group.' Once you have added that individual to the group, it will appear in the list in the middle.
- You can also remove an individual from the group in this window by clicking on 'Delete from Group' when the proper Folder and Group are selected.

o Buttons – In the Communication Groups screen, there are three buttons at the top.

- Add New Group**– Refer to the [Add a Group](#) section of this guide.
- Copy Group:** This function transfers all individuals from one group to another. It does not remove them from the original group but adds them to the individuals already listed within the group you are copying to. Click 'Copy Assignments,' and when it is completed, “Copy Complete” will appear at the bottom of the screen. Click on 'Close' to return to the main group screen.
- Group Reports** – Click here to access the list of reports, labels, and exports about groups.

o Additional Functions—All other functions that can be performed will appear in the Group List, indicated by icons. Check the gear icon to verify that all functions are displayed in your view.

Communications : Communication Groups ? help

Add New Group Copy Group Group Reports				Communication Groups						
By	Folder	Group	Count	View	Edit	Email	Text	Events	Delete	
Search...										
by Individual	Age Ministries	75 and older	258							
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by Individual	Age Ministries	Children's Ministries	3							
by Individual	Age Ministries	College Students	20							
by Individual	Age Ministries	Cradle Roll ALL	21							

- View – Click the eye icon to open a group. Here, you can view and search group members, quickly remove members, or create custom reports using the filters.
- Edit – Single-click on any folder or group name to edit the name, or use the edit icon to add or remove group members. You can also create custom group reports using the filters.
- Email – Clicking on the envelope icon will open a new window, allowing you to draft an email and add attachments to send to all group members.
- Text—This option allows you to send a text message to a group. Clicking on the message icon in the Text column opens a screen for composing a text message.*
- Events—To set up and track attendance for group events, click on the calendar icon in the Events column for any group. Then, choose Add a New Event, type the event name, select a date and frequency, and click Add. To edit an existing event, select the date from the Event List drop-down.
- Delete – Click the trash can icon to delete the group and its history, including group events.

* To learn more about setting up automatic birthday and anniversary emails, or texting and emailing groups in general, please refer to the [Communications Guide](#).

Create Group Events

This feature allows you to track attendance for a specific group.

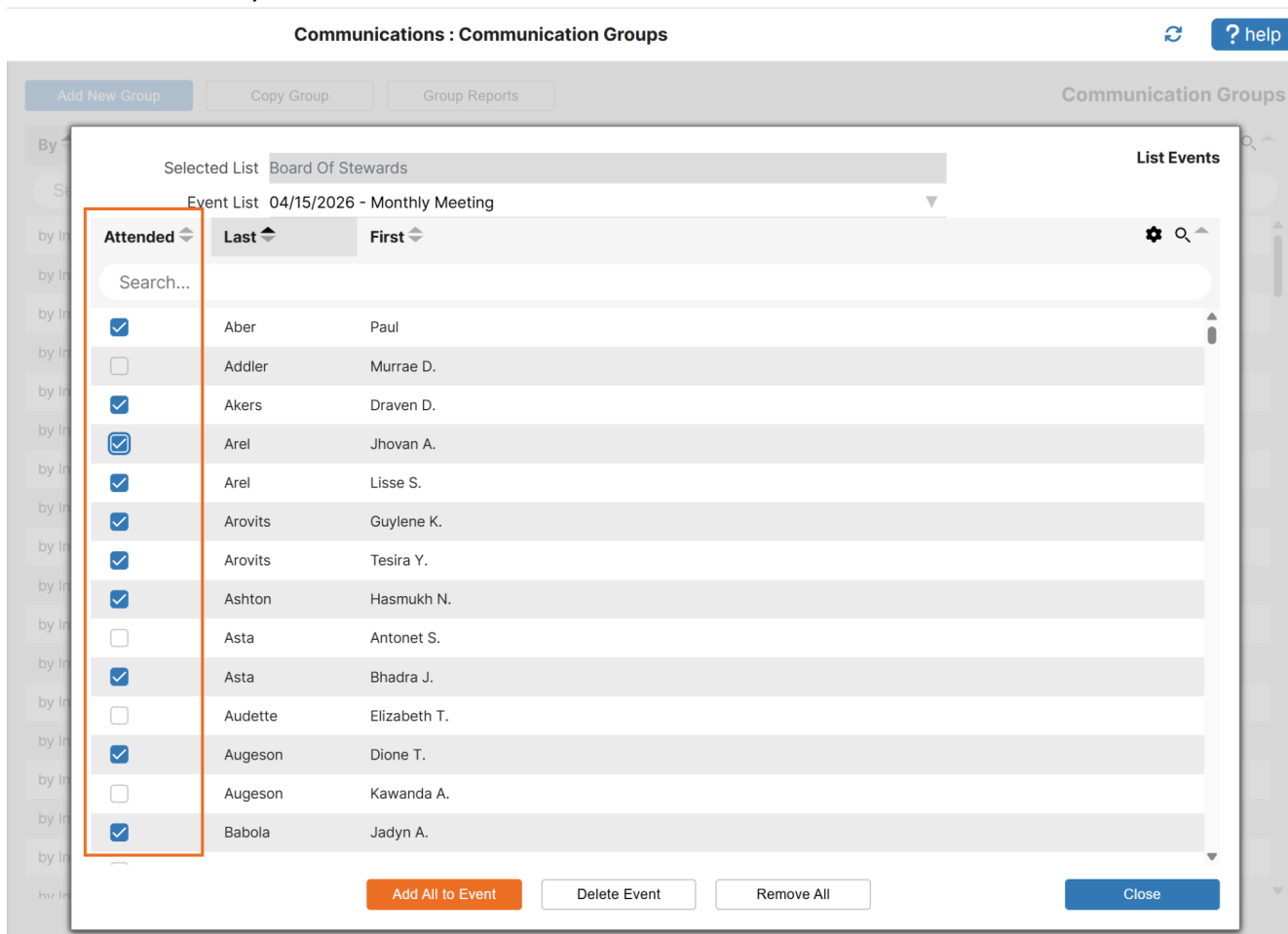
1. You must first locate the group on the Communication Groups screen.
2. Click the calendar icon under the Events column. This will open a new window.
3. Choose 'Add New Event' from the Event List drop-down menu.
4. You will then have other fields to complete, such as Event Name, Event Date, and Frequency.
5. If it is a one-time event, choose 'Do Not Repeat.'
6. If this is a recurring event, select the frequency of how often the event occurs, and a new field will populate to choose an Event end date.
7. When finished, click 'Add.'
8. You can add more events or click 'Close' when you are done.

Note: Once created, events cannot be edited; they can only be deleted. To delete an event, select the event from the Event List drop-down menu and click "Delete" at the bottom of the screen.

Taking Attendance for Group Events

Once you have added a Group Event, you can track the attendance of those group members.

1. Click the calendar icon in the Groups screen next to your specific group.
2. Select the event you want to track attendance for from the 'Event List' drop-down menu. This will populate the list of members in that group.
3. Click the boxes next to the group members who were in attendance. Your selections are immediately saved.



4. The 'Add All to Event' or 'Remove All' options will add or remove all individuals from the list displayed for the selected event. This is helpful when you know most of the individuals have attended—you can use the 'Add All' option and then uncheck the few who didn't come to save time.
5. When finished, click 'Close.'

You are all set!