Outreach Connect

A Product of CAA Software, Inc.

Outreach Connect User Manual

Church Growth Strategies Through

Sunday School, Care Groups, & Outreach

Involving Members, Guests, & Prospects

PREPARED FOR: YOUR CHURCH

February 1, 2012

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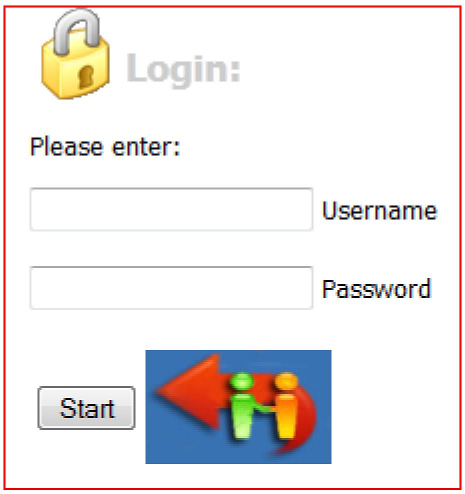
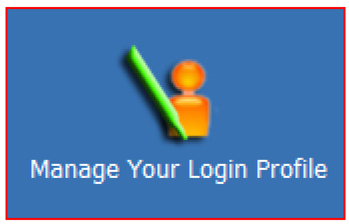
Quick Start Guide

CAA Ministries recommends you read the ***User Manual*** to learn about all the features and nuances of using ***Outreach Connect***. But, we know some of you just want to dive in and get started! Try these six easy steps and you will be making contacts in no time!

Step 1: Copy URL –into your Browser to connect with the Team module logon:
(sample) http://www.caaministries.net/outreachconnect/gabaptist/index.php



Step 2: Logon –to the Team module with Username and Password (see left) supplied to you by your church's ***Outreach Connect*** Administrator.



Step 3: Click Profile – after your first logon to change your own Password and check your E-Mail Address and Phone Number for accuracy. Team, be sure to keep these updated!

Step 4: Browse List – of contact names (see example below). Select a contact with status = Available (example Roger Arthur below) and **Click Check-Out**. When you "**Check-Out**" a contact record, you ensure no one else will be attempting to contact the same person. You have reserved them for you to contact.

FirstName LastName	VisitDate	Category	Status	View	Check-In/Out
{Outreach Connect - Quick Start Guide.pdf}	02/01/2012	Informational Document	Contact Administrator	View Doc (PDF)	View Doc
{Outreach Connect - User Manual.pdf}	02/01/2012	Informational Document	Contact Administrator	View Doc (PDF)	View Doc
Betty Abbott	01/01/2012	Deacon Visitation - Homebound	**Checked-Out**	Info	Info
Bill Alcott	01/29/2012	Touch-2 Adult - Agape	**Checked-Out**	View History	Check-In
Roger Arthur	01/29/2012	Touch-2 Adult - Agape	Available	View Doc (RTF)	Check-Out

After clicking on the **Check-Out** link, the Status column will change from "Available" to "**Checked-Out**" as shown above with the Bill Alcott contact record.

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Step 5: Make Contact – via card or letter, phone, e-mail message, personal visit, etc. Don't forget to gather any important information about the person or family such as their contact information, names and ages of their kids, ministry preferences and skills; and do they want to sing in the choir, teach a class, have a prayer request to share, etc.

Step 6: Logon to ***Outreach Connect*** again and **Click Check-In**. During the Check-In process, you enter all the information you gathered about the person or family when you made the contact earlier.

FirstName LastName	VisitDate	Category	Status	View	Check-In/Out
{Outreach Connect - Quick Start Guide.pdf}	02/01/2012	Informational Document	Contact Administrator	View Doc (PDF)	View Doc
{Outreach Connect - User Manual.pdf}	02/01/2012	Informational Document	Contact Administrator	View Doc (PDF)	View Doc
Betty Abbott	01/01/2012	Deacon Visitation - Homebound	**Checked-Out**	Info	Info
Bill Alcott	01/29/2012	Touch-2 Adult - Agape	**Complete**	View History	View History
Roger Arthur	01/29/2012	Touch-2 Adult - Agape	Available	View Doc (RTF)	Check-Out

After clicking the **Check-In** link, the Status column will change from "**Checked-Out**" to "**Complete**" as shown on the Bill Alcott example above. The Check-In/Out column will change from **Check-In** to **View History**.

That's it! The system is simple to use—you access the contact list from your home computer; choose someone to contact and "**Check-Out**" that person to you; make the contact; and "**Check-In**" that contact record.

Overview of Outreach Connect

General Overview

Outreach Connect is a web-based tool for staff, leaders, and volunteers to use in managing contacts with groups of people. The groups typically include church members, guests, or prospects. You may form groups to address almost any purpose, and a group could even be a collection of ministries or businesses as well as people.

In ***Outreach Connect***, "prospect" is a term used to mean any person who has never visited your church (or class or group). Prospects are people you want to reach out to and invite to attend your worship service, Sunday School class, or ministry event. You may have to stay in contact with them and follow up with them to get them to attend. "Guest" is a term used to mean a non-member who has visited in your church or group or has attended one of your ministry events at least once. Although they are non-members, guests may be regular attenders.

Your Baptist Church can use ***Outreach Connect*** to remain in regular or periodic contact with members, guests, and prospects and keep track of the contact history. This tool aids the local church with organizing people into groups of manageable sizes—care groups, for example—and in performing a variety of follow-up or outreach needs. ***Outreach Connect*** is a convenient tool for churches to make available to their leadership, their outreach teams, and their ministry teams. The tool assists leaders in the coordination and exchange of information between Sunday School classes, care groups, prospects and outreach needs, visitation assignments, and more.

With ***Outreach Connect***, you build an online, Internet-accessible database of people. Some may be members, some may be guests, and some may be prospects. In database terminology, these entries are contact records. Churches use contact records to manage and track the outreach and follow-up needs with people such as those shown in the following list:

- prospects—people that have not yet visited your church
- first-time guests and repeat visitors
- members of groups such as Sunday School classes
- Sunday School class care groups—segments of a class each with an outreach and/or care leader

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- prospects for—or members of—choirs, RA's, GA's, AWANA and other ministries
- deacon family ministry assignments or deacon visitation programs
- homebound and senior adult outreach and care
- hospital and nursing home visitation
- any other groupings of people that it would be helpful to contact and track

Follow-up with prospects, guests, or members may occur in a variety of ways. These include by telephone, with a card or letter, by e-mail message or text message, with a personal visit to their residence, or by any other means that appropriately meets your church or group needs.

After a contact has been made by your team member, the results—comments and feedback, prayer requests, important family data, special instructions, follow-up recommendations, etc.—are entered and tracked online. Churches may maintain the history for months or years if desired.

You may define "Sources" of prospects as groups and track them in any way useful to your church. Some examples of sources might be as follows:

- newcomer lists
- Sunday service walk-in guests and visitor cards
- home Small Group or Block Party attendance records
- church events such as VBS, Fall Festivals, Holiday Musicals, or Wild Game Dinners

Governance

The ***Outreach Connect*** software is comprised primarily of a Team module and an Administrative module. This ***User Manual*** is for those who use the Team module. A separate manual is available for those who use the Administrative module.

Governance of setup, control, and administration occurs in the Administrative module. A church typically will have only one or two people designated as Administrators. However, anyone can logon and perform administrative functions if granted the appropriate permission settings.

Churches normally designate "Team Leader" permissions to staff and volunteers who will be functioning as outreach leaders, class and care group leaders, and others

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assisting in using the system to coordinate groups. Team Leaders cannot logon to the Administrative module.

Those who use the system only for getting their contact assignments and recording results have "Team Member" permissions. Most of your outreach volunteers will be Team Members. However, like Team Leaders, Administrators may also logon to the Team module to make contacts and record results.

Some examples and illustrations provided in this ***User Manual*** are from churches using ***Outreach Connect***. CAA wanted to make this manual as helpful and practical as possible.

Terminology

The naming conventions shown in this chart will apply throughout this manual:

Term	Meaning
Outreach Connect	An Internet-based system of modules and databases used in managing contacts (members, guests, prospects) and groups of people. Users may be church staff, leaders, and volunteers. The system may be used to manage member and guest care groups, Sunday School or Discipleship classes, Small Groups, etc.
Team Member	Anyone authorized to use the ***Your Baptist Church Outreach Connect*** system, but does not have "Administrator" or "Team Leader" permission settings. This is the lowest level of system access. The Team Member uses the Team module to identify available contacts, and after making the contacts, to record the results.
Team Leader	Anyone given "Team Leader" permission settings. The Team Leader has the same permissions with the Team module as Team Members, plus the ability to construct and save custom Searches and use the Reporting function.
Administrator	Anyone granted "Administrator" permission settings. The Administrator may logon to the Administrative module and perform system control functions. The Administrator may also logon to the Team module and interact in the same manner as a Team Leader or Team Member.

Prospect	Anyone who has never visited your church, class, or group, or attended one of your church ministry events but lives geographically within your church's local community or sphere of influence. Prospects are people you want to reach out to and invite to attend your worship service, Sunday School class, or ministry event, etc.
Guest	Anyone who is a non-member but has visited in your church or group or has attended one of your ministry events at least once. Your goal in reaching out to prospects is to turn them into guests by getting prospects to attend at least once. When they attend, even if it is the first time, you can start to get to know them and build relationships.
CAA	Short abbreviation for CAA Software, Inc., owners of CAA Ministries, ***Outreach Connect*** and other CAA products: • ***Direct Communicator*** helps churches communicate with members, guests, and prospects via a single integrated tool in ways such as web page, e-mail, texting, and phone-tree messages. • ***Sundial CEF*** is an online web calendar program that also includes such powerful features as facility scheduling, equipment scheduling, event registration, and online event payments. • ***Prayer & Harvest Campaign*** is a special solution that provides the church with up to 2,500 household contacts in their community and includes training and support for reaching the unchurched and the lost through a prayer and invitation ministry. • ***Eagle-Wings*** is a church growth strategy and set of tools for building your church and expanding ministry through becoming a Great Commission-driven church utilizing Sunday School or Small Groups for evangelism, discipleship, fellowship, and ministry.

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Advantages of Outreach Connect

Outreach Connect is an ideal tool for outreach leadership at your church. It helps them create and maintain lists of available workers who will make contacts. The church can also develop an easily accessible database of member and prospect contacts. The Administrator can arrange Team Members into groups and use the system for quickly e-mailing them or phoning them. ***Outreach Connect*** takes advantage of the Internet to help leadership keep Team Leaders and Team Members informed of outreach opportunities and needs, no matter where the team people are—at home, at school, at work, at church, or even while traveling around the state or nation.

Outreach Connect enables leadership to quickly and easily update or adjust the contact file and thus keep the outreach emphasis fresh and current. Although Administrators set up Team Member records, the Team Members may update their own profiles to assist in keeping their contact information current. Administrators create and maintain group lists to control distribution of messages for targeting specific Team Leaders and Members (deacons, for example) or specific classes or groups (of members/prospects) when an outreach need is urgent.

Outreach Connect has privacy features that members, guests, and prospects will really appreciate. Unlike some web-based applications, Team Leaders and Team Members connect without any annoying popups or unwanted advertising. There are no private "chat rooms" that have been known to complicate family relationships. There are no addictive games or social connections to rob your time. Just as importantly, there are no "strangers" using ***Outreach Connect***. Outsiders without a Username and Password cannot gain access to your church outreach data to steel identities or attempt to "become friends" with church members and their children.

Special Features

Here are a few more features of the ***Your Baptist Church*** ***Outreach Connect*** system from CAA that you may appreciate:

- Administrators can send e-mail messages to Team Leaders and Team Members from within the system. They do not have to use a separate e-mail system, saving time while they are busy updating outreach contacts.

- Team Leaders and Team Members may maintain their own contact profiles. They control their own username and password settings and keep their e-mail addresses and telephone numbers current.

- Team Leaders and Team Members can print road maps and driving instructions from within the system. This saves time when you are reviewing available outreach needs. You select a contact, and if an in-home visit is appropriate, you can look at a road map immediately and print it if needed.

- ***Outreach Connect*** is entirely Internet-based—there is no need for your church to have its own IT professionals or to maintain servers, websites and databases. There is no software to install on church computers, or on Administrator, Team Leader, or Team Member family personal computers or laptops.

- Your church does not need to have an "outreach" night. Leaders and Team Members do not have to assemble at the church before doing home visits, visits to nursing homes, etc. Outreach leaders manage the entire process over the Internet, and Team Leaders and Team Members get their assignments and report their results over the Internet.

  Administrators logon from home, office, church, or even while traveling. They can review the status of outreach needs, make updates, and notify Team Members via e-mail if the need is urgent.

  Team Leaders and Team Members may logon from home, school, office or wherever they have Internet access. They simply review available outreach assignments presented to them, take one (called the "checkout" function), make the contact or visit, and then enter the results (called the "check-in" function). Once an assignment is taken, the status of that contact record will be changed from "available" to "checkout" and later to "completed". Only those with a status of "available" still need an outreach Team Member to take the assignment.

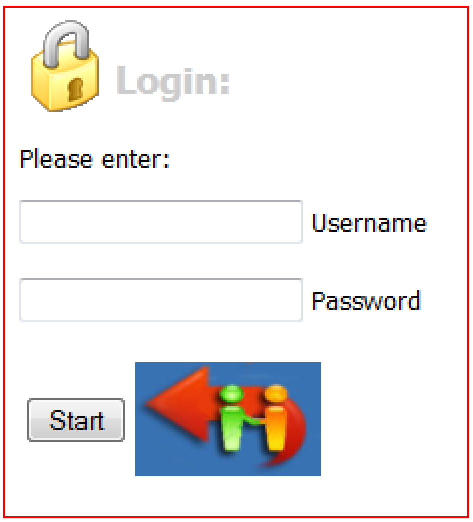
About the Supplemental Materials

For an overview of how to easily find the Team Member login screens, please refer to ***Section "A"*** at the end of this ***User Manual***. It contains a thorough explanation of the logon process.

Getting Started with Outreach Connect

The purpose of this ***User Manual*** is to assist you in learning to use ***Outreach Connect***. After you have started using the system, this will serve as a reference source for you in the future. In the pages that follow, we will show you the Team Leader and Team Member functions and step you through their use.

Team Member Logon



First, to access the Team Leader or Team Member functions, you must logon via the Login screen. See an example graphic at the left. Refer to **Section "A"** of this manual for more information about accessing the login screen and more details about the logon process.

Team Leaders & Team Members: Enter your Username and Password and then click the ***Start*** button.

Note: If you do not have a Username and Password yet, you must contact your church's ***Outreach Connect*** Administrator. You cannot add yourself to the Team Member list. This is another way in which outsiders are prevented from gaining access to your church's outreach contact database.

Upon completion of setting up your profile, by the Administrator, they should provide you with your Username and Password. Then you will be a registered Team Leader or Team Member and will have a Username and Password to use for logging into ***Outreach Connect***. After you logon the first time, you may update your profile if you so desire, and change your Username and Password to whatever you prefer.

After logging in, Team Member functions are accessible on the main screen by using the **Icon Buttons**, also known as feature buttons. The **Icon Buttons** are followed by the contact records on the lower half of the main screen similar to those shown in the following example graphic that was taken from an actual church ***Outreach Connect*** system.

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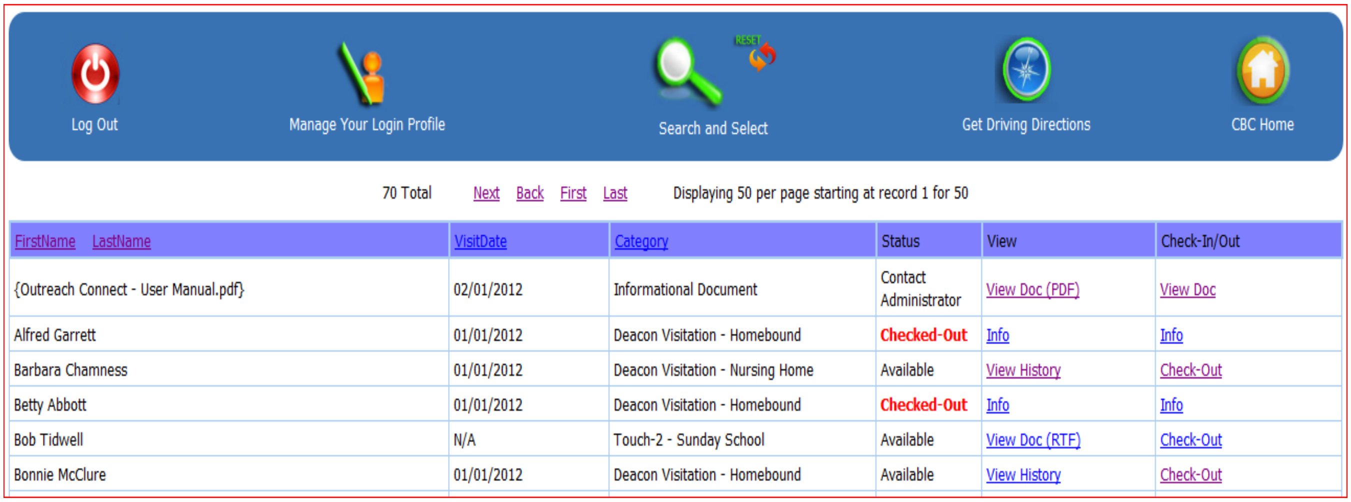


FirstName LastName	VisitDate	Category	Status	View	Check-In/Out
{Outreach Connect - User Manual.pdf}	02/01/2012	Informational Document	Contact Administrator	View Doc (PDF)	View Doc
Alfred Garrett	01/01/2012	Deacon Visitation - Homebound	Checked-Out	Info	Info
Barbara Chamness	01/01/2012	Deacon Visitation - Nursing Home	Available	View History	Check-Out
Betty Abbott	01/01/2012	Deacon Visitation - Homebound	Checked-Out	Info	Info
Bob Tidwell	N/A	Touch-2 - Sunday School	Available	View Doc (RTF)	Check-Out
Bonnie McClure	01/01/2012	Deacon Visitation - Homebound	Available	View History	Check-Out

Notice that the **Icon Buttons** are in the blue-colored heading area of the screen. Four of these feature buttons are shown in the above example: ***Log Out***; ***Manage Your Login Profile***; ***Search and Select*** (with the smaller ***Reset*** symbol next to it); and ***Get Driving Directions***. Other buttons may be present in your specific implementation of the ***Outreach Connect*** system. In the above example, clicking on the last button on the right will open a new window to the church's website.

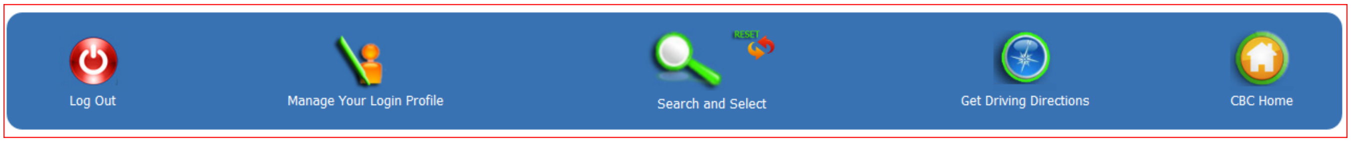
(Note: Administrators may ask your CAA representative to create custom buttons linked to other websites, such as your church website in the above example. CAA will create the customized buttons so your team workers may conveniently access other sites.)

Below the feature buttons in the above graphic example, you will see a partial listing of contact records. Later in this manual, we will go into more detail concerning the contact records.

Before we take a closer look at the contact records, in the next few pages we will examine each of the **Icon Buttons** and show you how to use the functionality of each of these ***Outreach Connect*** features.

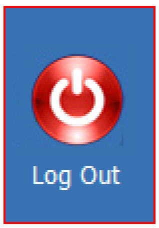
Using Feature Buttons

Now that you have been able to logon and view the ***Outreach Connect*** main screen, we will examine what you can do with each of the Feature buttons. The following graphic shows an example of the feature area with the **Icon Buttons**.



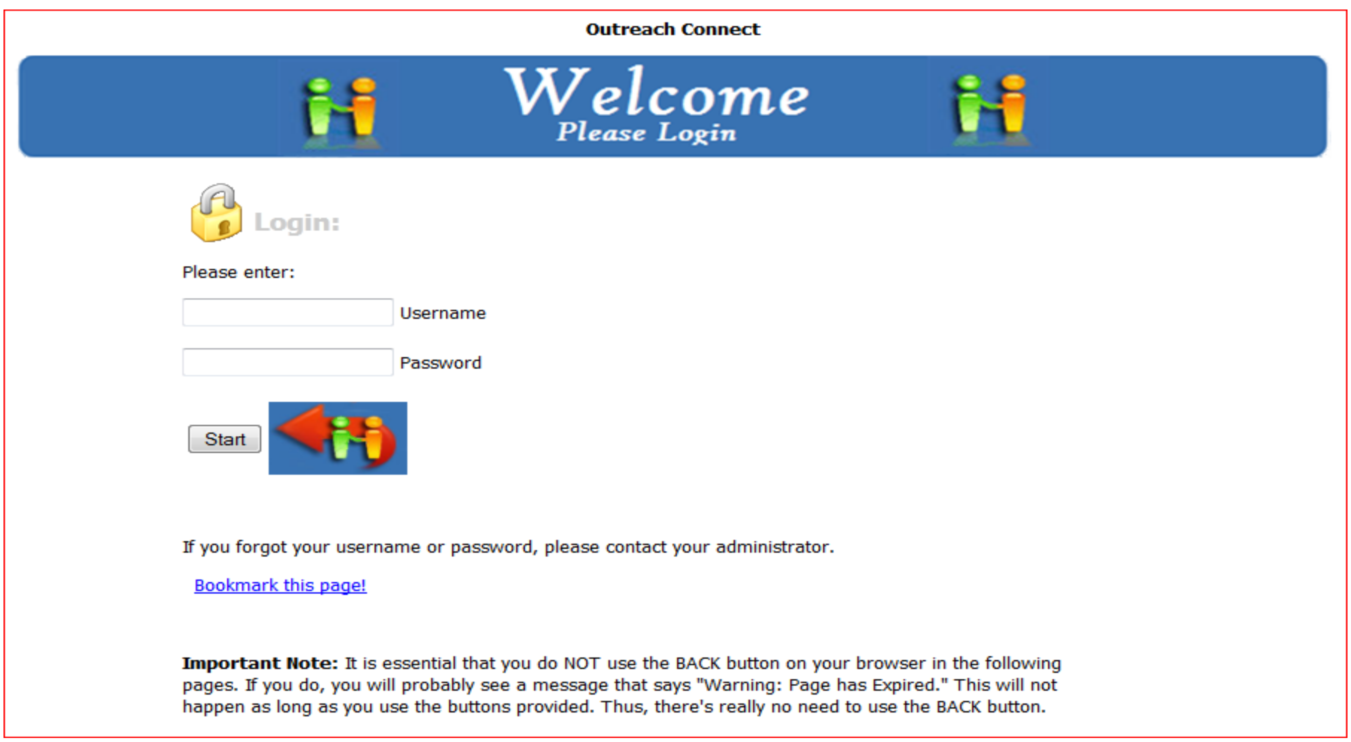
Logging Out

When Team Leaders and Team Members are finished with their work, they leave the system by logging out.

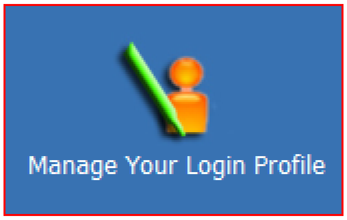


Click the ***Log Out*** button, shown on the left, to quit ***Outreach Connect***.

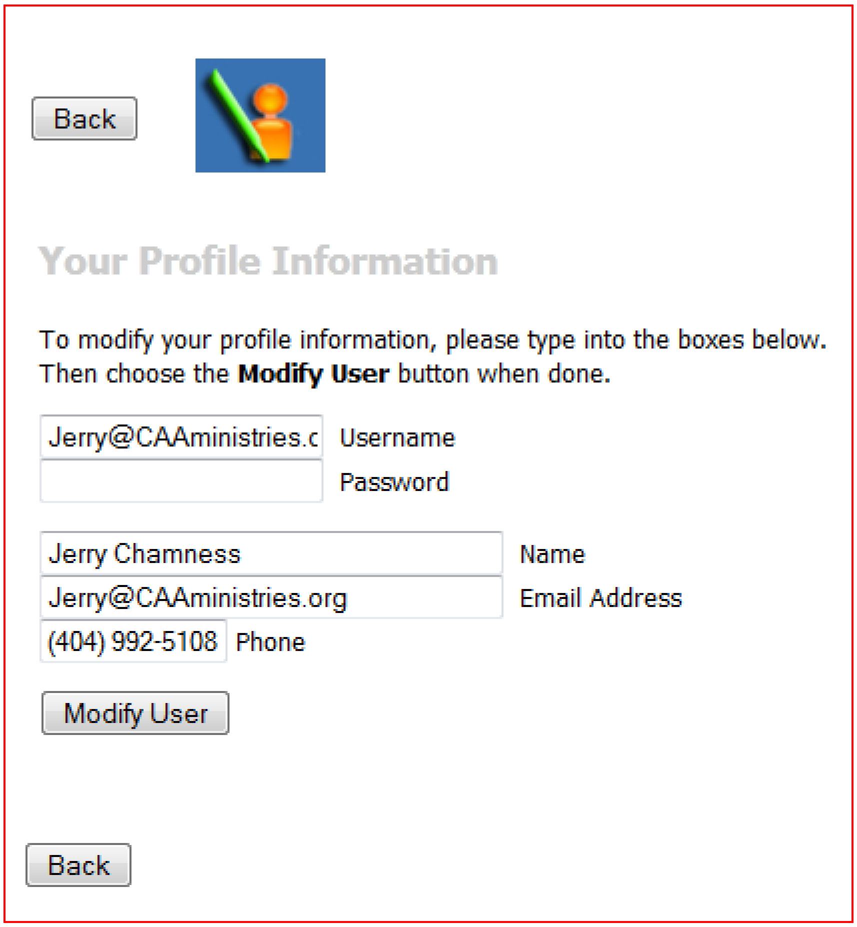
After logging out, your Browser may display a screen that looks similar to the example graphic below. Just close your Browser when you are ready.



Managing Your Profile



Team Leaders and Team Members, if you want to review or update your personal profile, click the ***Manage Your Login Profile*** button shown at the left. You can change your Username or Password, update your Phone Number, etc., from the Profile screen.



After clicking the feature button, you will see a screen that looks like the example graphic on the left.

Change your Username if you prefer, and your Password if you prefer. Enter your changes in the text boxes (example shown at left).

Username has to be unique, 4 characters or more, without spaces. It can be a name or your e-mail address. It is not case-sensitive.

Password does not have to be unique. It must be at least 4 characters, no special characters, and passwords are case-sensitive.

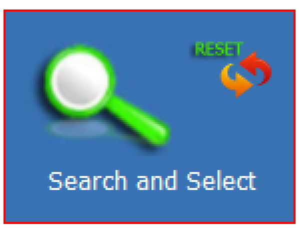
Make sure your Email Address and Phone number are correct, and if not, update them. Use the phone number format (999) 999-999 as shown in the example.

Click the ***Modify User*** button to save the updates. To abandon the changes without saving them, click the ***Back*** button instead of the ***Modify User*** button.

Setting Search Filters

The list of members, guests, and prospects can become quite lengthy. Your church could define and track literally hundreds or thousands of contacts with ***Outreach Connect***. Contacts could include any source of prospects you can think of, such as Sunday guests, newcomer community lists, or children who came to your VBS. There can also be several groups of church members your church is tracking and systematically calling or visiting, such as the homebound, those in nursing homes, Sunday School class members, care groups, youth parents, RAs, GAs, AWANA—but you may only want to see available contacts from one group or a combination of groups—not all several hundred contacts.

Note: the Administrator designates which categories a Team Member “sees” or, in other words, can access when logged on. For example, if there are 20 categories of members and prospects in the outreach database, Team Leaders and Team Members may be granted access to all 20 of them. However, if the Team Member only has outreach responsibilities for “Sunday guests” for example, the Administrator can limit the Team Member’s view to that one specific contact category. The Search filters become very useful when the Team Member has access to multiple contact categories and needs a way to eliminate the clutter and focus on just one to find those available contacts.



When the list of outreach contacts is lengthy, the Search/Select feature can be a powerful tool to help you narrow the focus. You can create a filter with values in any or all of the selection criteria. To create a search filter, click the ***Search and Select*** button (shown on left).

The example graphic on the next page shows the typical filter selection criteria. Enter your selection values and click the ***Select By Above Criteria*** button near the bottom of the screen to create a list of just those contacts (can be prospects, guests, or members) in which you have an interest.

The Search/Select filter choices are shown on the next page.

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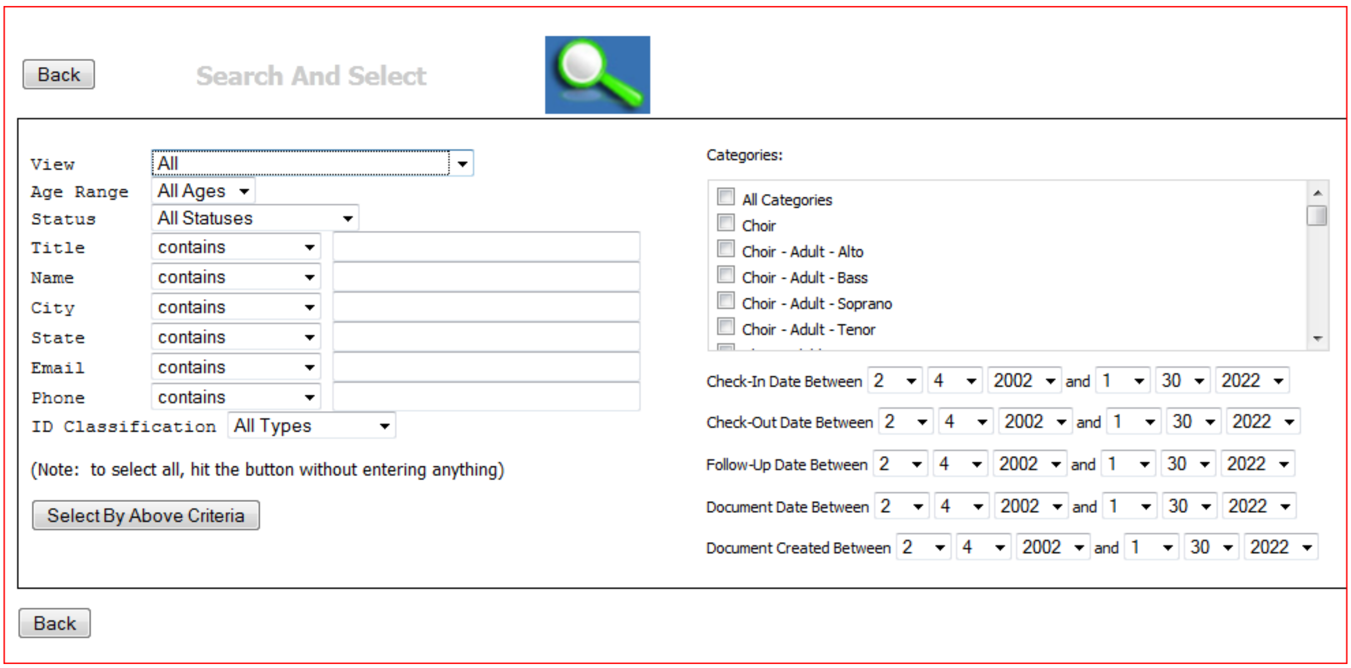
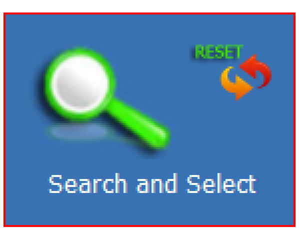
In this example graphic shown below, you will see that filters can select contacts by age; status such as available, checked out, complete, etc.; first or last name; city, state, etc.; one or more categories (by checking the box just left of each desired category); certain date ranges; or any combination of these.

When the ***Select By Above Criteria*** button is clicked, the Team Leader or Team Member will see a list that includes only contact records that match the values you entered or selected from the pull-down menus.



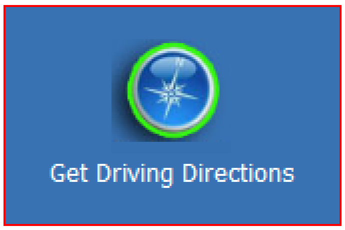
Turning Filters Off



To remove a filter, click the ***Reset*** button (shown at left). It is located next to the ***Search and Select*** button and just to the top right of it. This will remove the filter values you entered earlier and will once again permit the complete display of all the outreach contact records in your defined view of the database.

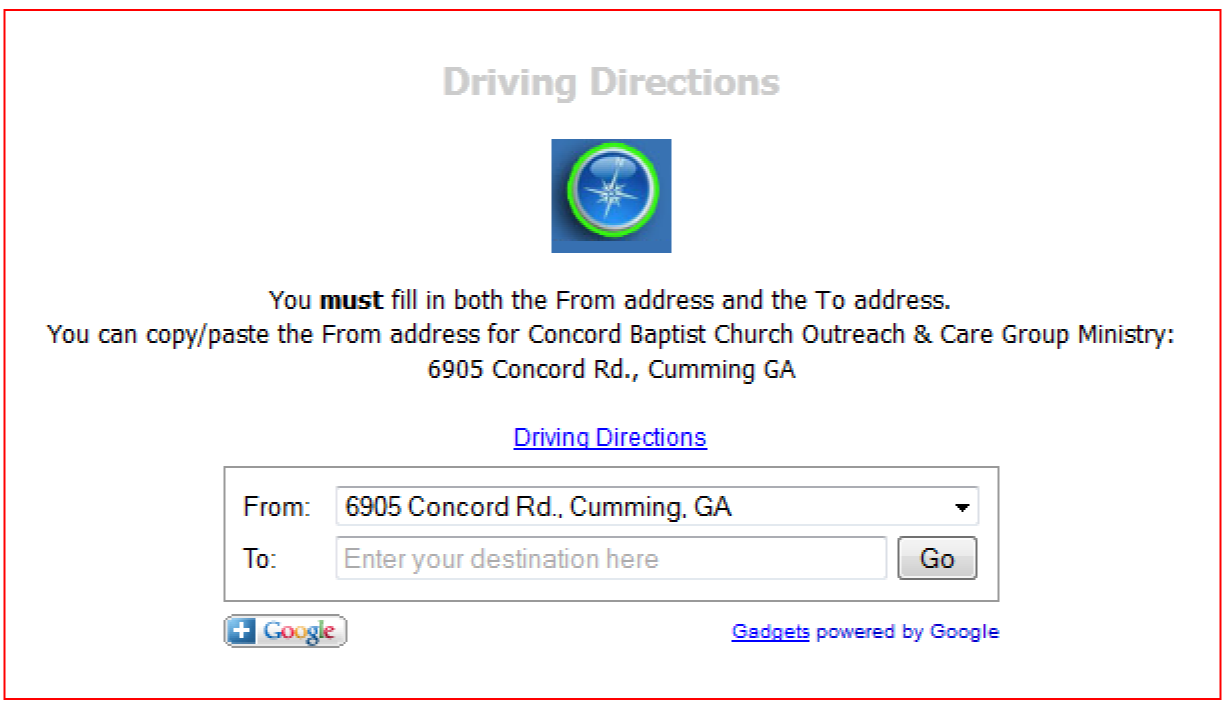
Mapping Driving Directions

There are times when Team Leaders or Team Members will make the outreach contact by visiting the person at a residence, nursing home, or other location. As a convenience, CAA has integrated **Google Maps** into the ***Outreach Connect*** system. If you want to look up driving instructions or print a map, you do not have to leave ***Outreach Connect*** to do that.



To look up driving instructions and a map, or to print these, click the ***Get Driving Directions*** button (shown on left). Team Leaders and Team Members will see a screen that looks similar to the example graphic below.

In the "From" box, your church address will be the default. However, you can change it to any starting point address. For example, that might be your home address. Then enter the contact address in the "To" box and click the ***Go*** button. This will launch the **Google Maps** application. In it, you can zoom in and zoom out to look at streets, neighborhoods, etc., and to learn the driving time and suggested route from your starting point to the destination point. Also, you can print the driving instructions if you so desire.



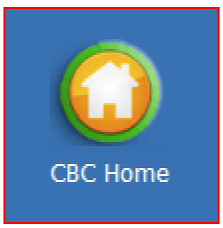
Customize Website Links

Your ***Outreach Connect*** has the capability of supporting buttons customized to fit your church's needs. Adding these buttons lets Team Leaders and Team Members link out to other frequently used websites.

CAA creates custom buttons for you. Just contact your CAA representative to request a custom button for your ***Outreach Connect*** system. A couple of examples follow.

Church Page Web Link

This custom button provides a quick and easy way for a Team Leader or Team Member to open another window and go to their church's website.



This feature button (shown at left) is labeled as the ***CBC Home*** button. However, you control the label name by asking CAA to give it any name you choose.

You may request other custom buttons for linking out to your favorite websites. This permits your ***Outreach Connect*** system to offer Team Leaders and Team Members convenient access to other popular websites.

CAA will also add custom buttons for you to link out to other CAA products used by your church. Just speak with your CAA representative to explore your options for custom buttons or special hyperlinks.

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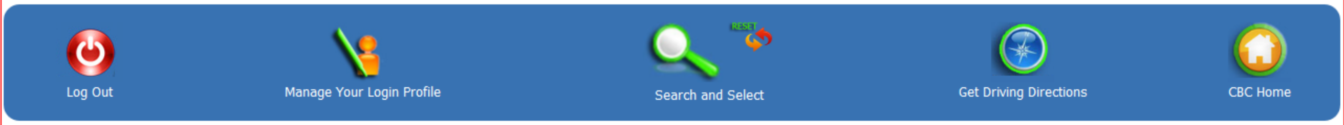
Working with Contact Records

After logging in, Team Leader and Team Member functions are accessible on the main screen by using the **Icon Buttons**, also known as feature buttons. Following the **Icon Buttons** bar is the listing of contact records. The example graphic below is from an actual church using the ***Outreach Connect*** system.



71 Total   Next   Back   First   Last   Displaying 50 per page starting at record 1 for 50

FirstName LastName	VisitDate	Category	Status	View	Check-In/Out
{Outreach Connect - Quick Start Guide.pdf}	02/01/2012	Informational Document	Contact Administrator	View Doc (PDF)	View Doc
{Outreach Connect - User Manual.pdf}	02/01/2012	Informational Document	Contact Administrator	View Doc (PDF)	View Doc
Betty Abbott	01/01/2012	Deacon Visitation - Homebound	Checked-Out	Info	Info
Wilda Bailey	01/01/2012	Deacon Visitation - Homebound	Available	View History	Check-Out
Myke & Shirley Barfield	01/01/2012	Deacon Visitation - Homebound	Available	View History	Check-Out
Harley & Jean Bennett	01/01/2012	Deacon Visitation - Homebound	Complete	View History	View History
Lark Bragg	N/A	Touch-2 Adult - Agape	Available	View Doc (RTF)	Check-Out
Tamika Bragg	N/A	Touch-2 Adult - Agape	Available	View Doc (RTF)	Check-Out
Denise Brenner	N/A	Touch-2 Adult - Agape	Available	View Doc (RTF)	Check-Out

In describing the contact list details, **Check-Out** and **Check-In** process, etc., we will refer to the example graphic below. We have enlarged it slightly to make it easier to see.

FirstName LastName	VisitDate	Category	Status	View	Check-In/Out
{Outreach Connect - Quick Start Guide.pdf}	02/01/2012	Informational Document	Contact Administrator	View Doc (PDF)	View Doc
{Outreach Connect - User Manual.pdf}	02/01/2012	Informational Document	Contact Administrator	View Doc (PDF)	View Doc
Betty Abbott	01/01/2012	Deacon Visitation - Homebound	Checked-Out	Info	Info
Bill Alcott	01/29/2012	Touch-2 Adult - Agape	Checked-Out	View History	Check-In
Roger Arthur	01/29/2012	Touch-2 Adult - Agape	Available	View Doc (RTF)	Check-Out

If the column heading is underlined, that means the column is sortable. For example, click on the **FirstName** link in the column header area to sort the contact name column alphabetically by first name, or click on the **LastName** link to sort by last name. You will see in the above example that the **VisitDate** and **Category** columns are also sortable.

Contact Document Records

Notice the first two contact records are actually documents. (See example graphic above on the previous page.) The Name column contains the name of the document, rather than the name of a person. The Category column shows that the category is "Informational Document." The View column shows that the document is a PDF. You may view it or download it to your computer by clicking the **View Doc (PDF)** link.

Only Administrators may create entries that appear on the contact list. They may upload "documents" as has been done with the first two on the contact record list we have been discussing, or they may create "people" records. Administrators use "document" records to provide Team Leaders and Team Members with instructions, forms, and other useful items. When a document record first appears on the list, you will want to "view" it and see if it contains anything helpful to you.

Contact People Records

In the above graphic example, the next three entries are "people" contact records. In exploring how to use people records, assume "you" are the current Team Member who logged into the ***Outreach Connect*** system.

- Betty Abbott has been "Checked-Out" by another Team Member. The Status column shows us that Betty is "Checked-Out", and the Check-In/Out column shows us that you can only "view" the contact record. Unless you are the person who performed the Checked-Out, you cannot perform the Check-In.
- Bill Alcott has been "Checked-Out" by you. In the Check-In/Out column, you have the option of performing the Check-In. No one else can Check-In a contact record unless he or she also was the one who performed the Checked-Out on the record.
- Roger Arthur is showing as "Available" in the Status column.

The contact process is very simple. If a contact record (member, guest, or prospect) is showing as Available, you may contact that person. In our example, that would be the case with Roger Arthur. If their status is Checked-Out, another Team Leader or Team Member is already contacting them. That would be the case with Betty Abbott and Bill Alcott. If their status is Complete, the contact has already been made and recorded. In our example, none of the people have a status of Complete yet.

Check-Out Process

Before you contact a person showing with a status of Available, you must perform the **Check-Out** process. This assigns the contact to you, and ensures that other Team Leaders or Team Members do not try to contact the same person. In effect, when you perform the **Check-Out** action, you lock that contact record—others can view the information about that person, but they cannot perform a **Check-Out** process until after you have completed your contact activity.

When you are ready to contact one of the Available people, click the **Check-Out** link in the Check-In/Out column.

Next you will see an opportunity to enter text into a description box, but you may leave it blank. If you do enter something, it would be something that might be helpful to the Administrator such as "I will visit next week." That would indicate to the Administrator that you intend to have the contact record locked (in **Checked-Out** status) for several days. But remember, if you keep a contact locked for several days you are preventing any other Team Member from contacting that person.

Lastly, click on the ***Yes I Will Make this Contact*** button. That will complete the **Check-Out** process. The record will show as **Checked-Out** in the Status column—see the Bill Alcott contact record in the above example graphic.

Make the Contact

Now that you have a contact record **Checked-Out**, you should make the contact with that person. You may make contacts in a variety of ways. As a Team Member, your Team Leader or someone else in the church leadership should tell you what type of contact you are expected to make with the person. Typical choices are:

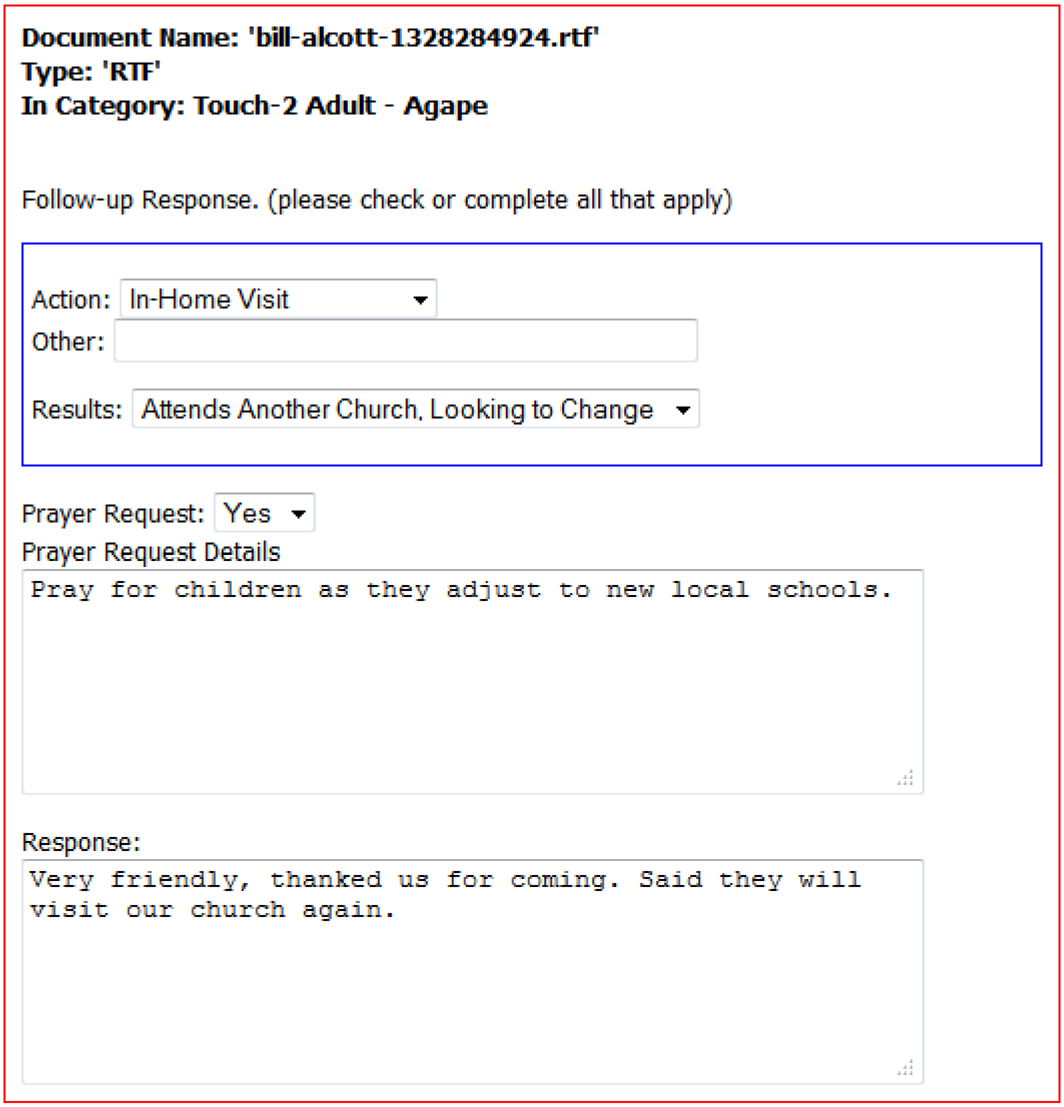
- Send them a card or letter
- Telephone and speak with them
- E-mail message or text message to them
- Visit with them at their residence
- Visit with them at another location (hospital, coffee shop, at church, etc.)

Gather as much information as you can, and keep it for the **Check-In** process.

Check-In Process

After you have made the contact, you will need to logon to the ***Outreach Connect*** system and record the results of the contact. To record the results and unlock the record for others to use, click the **Check-In** link in the Check-In/Out column.

When you click the **Check-In** link, you will see a screen that looks like the graphic example below. (Note: The first half of the Check-In screen is on this page.)


Document Name: 'bill-alcott-1328284924.rtf'
Type: 'RTF'
In Category: Touch-2 Adult - Agape

Follow-up Response. (please check or complete all that apply)

Action: In-Home Visit
Other:
Results: Attends Another Church, Looking to Change

Prayer Request: Yes
Prayer Request Details
Pray for children as they adjust to new local schools.

Response:
Very friendly, thanked us for coming. Said they will visit our church again.

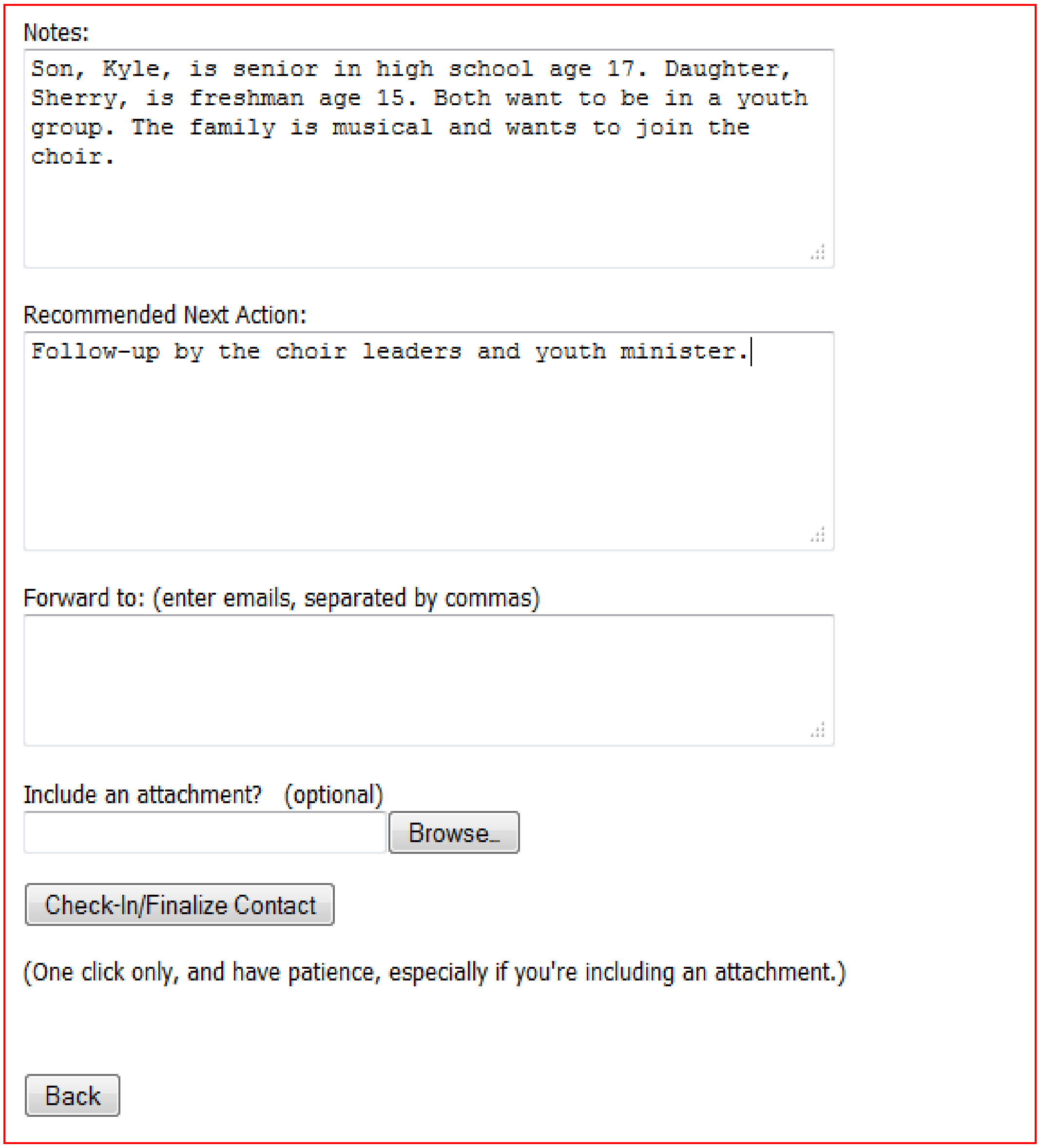
The "Document Name" will show the person and the Category will show the group the person is in.

Use the Action & Results menus to select the most accurate answer from each pull-down list.

If they give you a prayer request, choose "yes" and enter it into the Prayer Request Details text box.

In the Response text box, enter in info about how the conversation or visit went.

(Note: The second half of the Check-In screen is on this page.)


Notes:

Son, Kyle, is senior in high school age 17. Daughter, Sherry, is freshman age 15. Both want to be in a youth group. The family is musical and wants to join the choir.

Recommended Next Action:

Follow-up by the choir leaders and youth minister.

Forward to: (enter emails, separated by commas)

Include an attachment? (optional)

Browse...

Check-In/Finalize Contact

(One click only, and have patience, especially if you're including an attachment.)

Back

In the Notes box, enter data and information you learned about the person and their family.

In the Action box enter anything helpful regarding follow-up needs or timing of the next contact.

If you feel some-one would want to see this info, enter their e-mail address in the Forward box.

To complete the Check-In process click the ***Finalize Contact*** button.

To exit without saving any data, and to keep the contact record locked, click the ***Back*** button. You will have to start the **Check-In** process over if you exit with the ***Back*** button.

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Following the **Check-In** process for the Bill Alcott contact record, you should see Bill's status changed from "**Checked-Out**" to "**Complete**" as shown in the Status column.

The contact list should now appear like the example graphic below. We have enlarged it slightly to make it easier to see.

FirstName LastName	VisitDate	Category	Status	View	Check-In/Out
{Outreach Connect - Quick Start Guide.pdf}	02/01/2012	Informational Document	Contact Administrator	View Doc (PDF)	View Doc
{Outreach Connect - User Manual.pdf}	02/01/2012	Informational Document	Contact Administrator	View Doc (PDF)	View Doc
Betty Abbott	01/01/2012	Deacon Visitation - Homebound	**Checked-Out**	Info	Info
Bill Alcott	01/29/2012	Touch-2 Adult - Agape	**Complete**	View History	View History
Roger Arthur	01/29/2012	Touch-2 Adult - Agape	Available	View Doc (RTF)	Check-Out

Notice that while Bill Alcott is in "**Complete**" status, any Team Leader or Team Member may click on the **View History** link and see the information about Bill. Whatever you and others entered after earlier contacts with Bill is available for viewing.

The Bill Alcott contact record will remain in "**Complete**" status until the Administrator resets it to "Available" status. After it is reset, that contact record will once again be available for someone to **Check-Out** and make another contact with Bill. Ask your Team Leader or church leadership what length of time between contacts you should wait before starting the contact process again.

One last thing of interest. When you choose either the **View History**, **View Doc**, or **Info** option, you can request a formatted, detailed report. You can view the report, or you may download it to your computer as a Microsoft Word document. Printing the report can be a handy option if you have someone who will make the contact but does not use a computer—give them the paper copy and then record the results for them when they bring you back news of the results.

Supplemental Materials

Section "A"—Accessing Outreach Connect (Logon)

Outreach Connect provides Administrators, Team Leaders, and Team Members with two methods for getting to the Team module login screen.

Via Browser URL

One option is to go directly to the login screen with the URL in your browser. For example, the URL for ***Your Baptist Church*** might look as follows:

http://www.caaministries.net/outreachconnect/gabaptist/index.php

Via Website Navigation

The other option is to go to the ***Your Baptist Church*** website and click on the **Outreach Team Logon** link on the Home page. The procedure for ***Your Baptist Church*** Team Leaders and Team Members follows.

Go to ***Your Baptist Church*** website (see example at left from a Georgia church website) & click the **Outreach Team Login** link (if your church has one).

Either way, you will come to the Login webpage (shown on the next page).

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Login Screen

The example graphic below shows the Team module login screen. Whether you used the Browser URL approach or you navigated your church's website, all access to the Team module goes through this screen. Administrators, Team Leaders, and Team Members may logon and perform "contact" functions.

Initially, an Administrator will assign a Username and Password to you.

- Usernames have to be unique, so a good practice might be to use the individual's e-mail address as their Username. Typically, each person has their own e-mail address and, as a Username, their e-mail address should be easy for them to remember.
- The Administrator might use your last name as your Password. If they capitalize the first letter, remember your Password is case-sensitive. After your first login, you can change the Password to whatever you want it to be (by updating your Profile).