eAdventist.net
HOW TO

Making your job as an online clerk easier! These cards are quick, easy-to-follow instructions on how to do basic transactions in eAdventist.net.

This in no way takes the place of calling if you have a problem and can't get it solved! But, it's nice to have ready answers just when you want them! Hopefully these will be just that for you. Please keep these cards near your computer so you have ready access on how to do various functions. Read the Index page to see all the situations that are addressed.

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INDEX

HOW TO

add a new family

1 // Go to People tab, select new family in sub menu
2 // Enter last name of head of household (if adding more than one individual to the family)
3 // Enter first name
4 // Enter name of your church
5 // Enter gender by clicking down arrow and making selection
6 // Enter marital status by clicking down arrow and making selection
7 // Enter birth date. If year is unknown, enter 1800
8 // Enter phone number - use this space for home number (mobile phone & work number entry location is below name)
9 // Enter address
10 // Click Save

* When a person is entered, remember they will always be listed as a nonmember until you change their status to member by baptism or profession of faith.

* A transferred individual will automatically be moved to your church list once the name has been accepted. DO NOT enter them as a nonmember.

HOW TO

add a new family member to an existing family

*one member of a family needs to be displayed on the screen in order to add additional family members

1 // Go to People tab, select advanced search in sub menu
2 // Enter last name of family
3 // Click Search
4 // Click on head of household's name
5 // Click on New Person tab at bottom right corner
6 // The cursor will then be located at the First Name location
7 // Enter first name, gender, marital status, and birth date. If the last name is different, make that correction as well.
8 // Click Save

* Notice many of the fields are filled in, saving you key strokes.

* Repeat above steps for each new person added to the family unit.

HOW TO

add a vacation address to a family's information

*for families gone for 2-3 months at a time

1 // Go to Person page for the family
(address will change for all members
of the family)

2 // Click on Edit Person

3 // On the Addresses line, click on
Alternate

4 // Enter the vacation address

5 // Click Save

6 // After clicking Save, the default address
will be displayed, so you will see the
street address again

7 // You need to indicate a different default address
type so that all mailings will go to the
alternate address

8 // Click on Edit Person, select Alternate
from "Default Address type" drop-
down list on lower left side of page

9 // Click Save

* All mailings will now be sent to the
Alternate address
* Be sure and change the address back to
street in the "Default address type"
when the family returns from vacation.

HOW TO

add a person by baptism/profession of faith

1 // Go to People tab, select advanced search in
sub menu

2 // Enter person's last name. Check to see
if the individual has already been
listed as a nonmember. If this is a
child, look up the parent's name so
you can enter the child in the correct
family unit

3 // Enter all personal contact information
for individual

4 // Click Save

5 // Once you click Save, the individual is
now listed in your church as a
NONMEMBER. You will need to change the
status now to a member

6 // Click on Change Status button

7 // The system default is set to Baptism.
All you need do is enter the baptism
date in the Effective date space. For
POF, see #9 below

8 // Click Save

9 // If the individual is becoming a
member by POF, click on the down
arrow by the word Baptism, and
select Profession of Faith

10 // Enter the POF date in the Effective
date space

11 // Click Save

HOW TO

enter a rebaptism date for an existing member

1 // Go to People tab, select advanced search in sub menu
2 // Enter the individual's name you wish to mark as rebaptized
3 // Click Search
4 // Click on the individual's name
5 // Click on the Change Status button
6 // At "Transaction", the program default is Change Status
7 // Click on the down arrow and select Rebaptize
8 // Enter Effective date
9 // Click Save

* If the individual is NOT a member of your church, then email the clerk of the other church and let them know the date of the rebaptism. Do not make the rebaptized person your member without checking to see if they have membership elsewhere - otherwise they will have dual membership!! Contact me if you have any questions.
* If the rebaptized individual wishes to become your member, then request a membership transfer. Once the person is your member, you can enter the rebaptism date in his record.

HOW TO

change the primary contact

1 // Go to Person page for any member of the family
2 // Click on "Change" by the current primary contact name
3 // Select a new Primary Contact for this family
4 // Put a dot next to the person's name who is now to be the new Primary Contact
5 // Click Save

HOW TO

join a person from one family to another family

1 // Be sure the individual you are moving is NOT listed as Primary Contact in their family unit. (See directions for Change the Primary Contact)

2 // Click on the person's name you wish to move - their name will be the one in the upper left hand corner of your screen

3 // Click on Change Family

4 // Select the second option - join an existing family

5 // Click Select - at the end of the blank gray space

6 // Enter the last and first name of the family to join

7 // Click Search

8 // Once the name appears, put a dot by the correct individual's name

9 // Click Select

10 // When the page refreshes, you will see the family name in the space just to the left of the Select button. If this is correct, click save

11 // Check to be sure the individual is properly identified ie, married, widowed, male, female, etc.

HOW TO

split a person off from a family to form a new family

1 // First, check to be sure the person you are moving is NOT listed as the Primary Contact. (See direction for Change the Primary Contact)

2 // Select the person you wish to move to their own family by clicking on their name. Be certain you have that person's name listed on the Person page (name will be in the upper left hand corner of the page)

3 // Click on Change Family

4 // Select the first option: create a new family

5 // Click Save

6 // When the page reappears, the individual will be in his own family unit

7 // Enter contact information for this newly formed family

HOW TO

change the name of the church for nonmembers

1 // Go to People tab, select advanced search in sub menu

2 // Find the name of the nonmember you are wishing to change

3 // Once on that individual's Person page, go to the Change button located on the right hand side of the current church name

4 // Click Change

5 // On the next screen, you will see Select at the end of the gray bar for "New church"

6 // Click Select, type in the new church name, click on Search

7 // Once the new church name is located, enter a dot to the left of the church and click OK

8 // The new church name will be listed in the bar

9 // Click Save

* This is an important step in removing nonmember children when parents move their membership. Even though the children are nonmembers, they will remain on your books unless you move them out or delete them. <u>Since they are not members, you cannot transfer them.</u> This step will move them, still as nonmembers, to the location of their parents. If you do not have the word Change next to the church name, you cannot do this from your screen. Contact me for instructions.

HOW TO

remove someone from membership

1 // Go to People tab, select advanced search in sub menu

2 // Enter last name

3 // Click Search

4 // Click on name to be removed

5 // Click on Change Status

6 // Deceased is the default option. Enter date of death. If date unknown, put today's date and enter in NOTE section "Exact date of death is unknown."

7 // Click Save

8 // Click on down arrow by Deceased for Missing or Removed (Apostasy) Options

9 // Enter Effective date (date of church business meeting vote)

10 // Click Save

* The "Removed" option is NOT to be used when someone transfers out of your church, was mistakenly added to your membership list, or is incorrectly listed twice in your membership records. **It is only to be used after a church business meeting has voted to remove someone from membership (missing, removed [apostasy]). If the member has initiated the request, you may enter the date of their request to the church board as the removed date. The request does not go before the church.** If you encounter a situation where you have someone in your records that should not be there, contact me for assistance if you are not sure which procedure to follow.

HOW TO

delete nonmember from membership

1 // Go to People tab, select advanced search in sub menu
2 // Enter last name
3 // Click Search
4 // Find nonmember that you wish to delete
5 // Click on Change Status
6 // "Change to" default is Member
7 // Click on down arrow and select Deleted
8 // Enter effective date
9 // Click Save

You can only delete a nonmember.
You cannot delete a member.
If a name needs to be removed, contact me about the situation and I'll instruct you on what to do.

HOW TO

request a transfer to your church

1 // Go to People tab, select transfers in sub menu
2 // Click on Request Transfer button
3 // By the first line, "To clerk of," click on Select
4 // Enter the Church name where the person wishing to transfer has said his membership is currently located
5 // Click on Search
6 // Put a dot next to the correct name. **TIP:** If the name does not appear, go back to the church name space and enter fewer words for the church name. **Example:** Instead of entering Calhoun Seventh-day Adventist Church, enter just Calhoun
7 // Click OK

8 // By the second line, "To join," click on the down arrow and enter your church name. **TIP:** You are only able to enter your church name - you can't put them into the incorrect church!
9 // Enter the Last name
10 // Enter the First name
11 // Enter date of birth if you have it, especially if a father and son have the same name. It will let the other clerk know if the request is for the father or son
12 // Click Save

HOW TO

request a transfer to an off-system church (one out of the North American Division)

1 // Go to People tab, select transfers in sub menu

2 // Click on Request Transfer button

3 // In the Transfer member box, put a dot by the second option: to an Offsystem church (from my church)

4 // "To clerk of," click on the down arrow and enter your church name. **TIP:** You are only able to enter your church. You are initiating the transfer for the other church since they are offsystem.

5 // "To join," click on Select at the end of the gray bar

6 // Enter name of offsystem church, hit Search

7 // Put a dot next to the correct name. **TIP:** If the name does not appear, go back to the church name space and enter fewer words for the church name. **Example:** Instead of entering Calhoun Seventh-day Adventist Church, enter just Calhoun. **IF** you do not see the name - **STOP** and call me or email me at the conference office. You will need to have the full name and mailing address of the overseas church when you contact me.

8 // If you <u>do</u> find the church listed, put a dot next to the church name

9 // Click OK

10 // Enter the Last name

11 // Enter the First name

12 // Enter date of birth if you have it, especially if a father and son have the same name. It will let the other clerk know if the request is for the father or son

13 // Click Save

HOW TO

check on a transfer

1 // Go to People tab, select transfers in sub menu

2 // Locate the name of the individual you wish to check. (Look in the To grant or To accept column)

3 // Click on the word View to the left of the name

4 // The next screen will show both churches involved in the transfer as well as the individual's name and the clerks name

5 // Place your cursor over the name of the <u>other</u> church (not your church) and click

6 // The next screen will show the organization information of the other church

7 // Click on the Contact tab located in the gray bar just above the list of church officers

8 // This will display the contact information for the church clerk. This is the person to contact regarding the transfer

* **Remember**, each church has **90 days** allotted for completing their part of a transfer. Don't get impatient, but if the 90 days are up, please email or call the clerk to see if there is a problem.

HOW TO

change incorrect spelling and/or name of an individual to allow transfer

1 // Click on People tab, select transfers in sub menu

2 // Click the word Vote to the left of the individual's name

3 // If the individual's name does not appear as a member of your church, it could be the name is spelled incorrectly in the record

4 // If you can tell by looking at the "Search last name" and "Search first name," what the problem is, that is the line to delete.
Example: if the last name is entered as PUR and the individuals name begins PER, this is where you will need to alter the spelling so the correct spelling appears. If the first name has been entered incorrectly, then follow #3 directions for the first name.
Example: if you have the individual listed as BILL and the request is for WILLIAM, the name will not appear.

5 // Highlight the incorrect first few letters of the name

6 // Leave it blank OR enter the correct spelling and click Search which is at the right side of the screen

7 // When the correct name appears, put a dot by the name

8 // Enter voted date

9 // Click Save

HOW TO

verify a newly transferred member's contact info

1 // After entering the 2nd reading date for a newly accepted person, click on SAVE

2// The next screen will have the transfer info. It will also have a bar at the top that says: Transfer accepted. New members name has been added to your church. View this member.

3//Click on View this member

4//Be sure your new member is not part of a family that belongs to another church. If so, you will need to split this person off to make a new family. (See How To card #8)

5//Please move the person to his own family and enter his new address.

* **Remember**, if you leave the person who is your member with the rest of his family and they live elsewhere with another address, your changing the address without moving your new member will change the address for EVERYONE in that family - whether they are your members or not!

* As soon as you accept the new member, always check this added feature immediately. If you don't have the new address, just leave it blank until you can get it.

HOW TO

print reports

1 // Go to Reports tab, select menu in sub menu
2 // Select the report by placing cursor over name
        of report and clicking
3 // Depending on the report you select, you may
        select the year, period and report format
        located in the upper left hand corner. Use
        drop down arrows for options.
4 // Click on box to the left of your church name
5 // Click on View Report
6 // Print report

HOW TO

print church member mailing labels

1 // Go to People tab, select person labels in sub
        menu
2 // On the Person Labels page, select the
        parameters you wish for your labels
3 // On the bottom right, you can view your list by
        clicking on the Search button
4 // To print a label list, select Print labels tab on the
        far right of your screen
5 // Click on your printer icon. Be sure you select
        from your printer options the correct size
        option

* Use Avery 5160 labels (30 to a page, 3 columns
        of 10)

HOW TO

change an office title from one person to another person

1 // Go to Organizations tab, select search in sub
        menu
2 // In "Name containing" space, enter your church
        name
3 // Click Search
4 // Of choices that are given, click directly on your
        church name
5 // Your church organization is now showing
6 // Click directly on the office title
7 // Click Select person
8 // Enter last name and first name of new officer
9 // Click Search
10 // Select correct name and enter a dot to the
        left of the name
11 // Click Select and Save

HOW TO

add a new office and officer

1 // Go to Organizations tab, select search in sub
        menu
2 // In "Name containing" space, enter your church
        name
3 // Click Search
4 // Of choices that are given, click directly on your
        church name
5 // Your church organization is now showing
6 // On the far right, select New Office
7 // By "Office Title" click on the down arrow
        for selection of offices
8 // By "Officer name" click Select person
9 // Enter last name and first name of new officer
10 // Click Search
11 // Select correct name and enter a dot to the
        left of the name
12 // Click Select and Save

HOW TO

delete an office

1 // Go to Organizations tab, select search in sub menu
2 // In "Name containing" space, enter your church name
3 // Click Search
4 // Of choices that are given, click directly on your church name
5 // Your church organization is now showing
6 // Click delete at the far right by the office that is to be deleted

HOW TO

renew a current church officer

1 // Go to Organizations tab, select search in sub menu
2 // In "Name containing" space, enter your church name
3 // Click Search
4 // Of choices that are given, click directly on your church name
5 // Your church organization is now showing
6 // Click "Renew" at the far right, by the office and officer that are to remain

HOW TO

transition from current clerk, YOU, to a new church clerk

1 // Inform your nominating committee that you use eAdventist.net to manage the membership for your church. Suggest to them that the new person elected have computer skills. This is the more efficient way and preferred by the conference

2 // Inform the committee that if they do not choose a person with computer skills, the chosen person will be required to communicate all membership and transfer information to the conference clerk

3 // Alert Caryn at the conference office to the fact that you will be relinquishing your duties and when. I'll need to know the name of the new clerk and her/his email address so I can communicate with them. The transfers will now be sent to the new person

4 // Access to eAdventist.net system with your code will be deactivated as sharing and passing on access passwords and email addresses is not acceptable. Each individual is to have their own access code. If the new clerk wishes to learn the eAdventist.net system, I will plan training exercises with them. Your assistance in letting them know what you have been doing and willingness to help them get used to things would be appreciated

5 // Thank you in advance for your excellent and dedicated time, effort, and skill. I'll miss you!