

Concord Church  
www.concorddallas.org

# Fellowship One

## Small Group Manager 2.0

For All Growth Group Leaders (includes Community & Bridge Groups, Morning Bible Fellowship Groups)

F1 Database Administrator

Contact for any issues: lbozeman@concorddallas.org 214-331-8522 ext. 265



2011

**Revision History:**

Revision 1.0 Original

Revision 1.1 Modified pages 5, 7, 8, 10 with new F1 release changes includes Profile Editor, Privacy Setting Editor for all members as of 3/1/2011. As a leader you can also download a Roster.



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All you need to know about managing your groups with the New Small Groups 2.0

**How to Access New Small Groups Manager 2.0:**

1. Go to [www.concorddallas.org](http://www.concorddallas.org) website
2. Click on Growth Group Tab



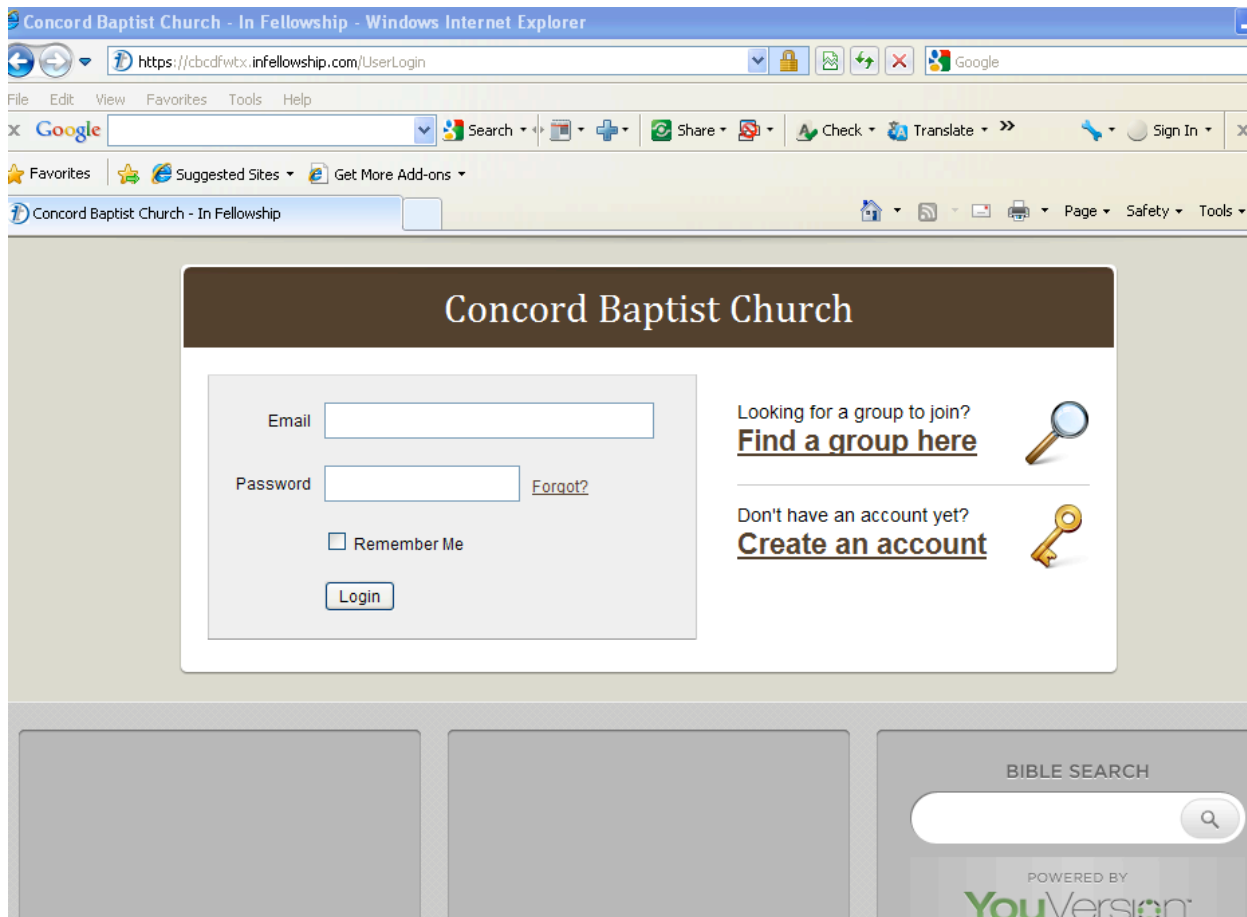
3. For all **SG leaders** (Community & The Bridge Groups, Morning Bible Fellowship, CCBS, and Bible Studies): Go to the bottom right hand corner Under the **Leader Toolbox** title.



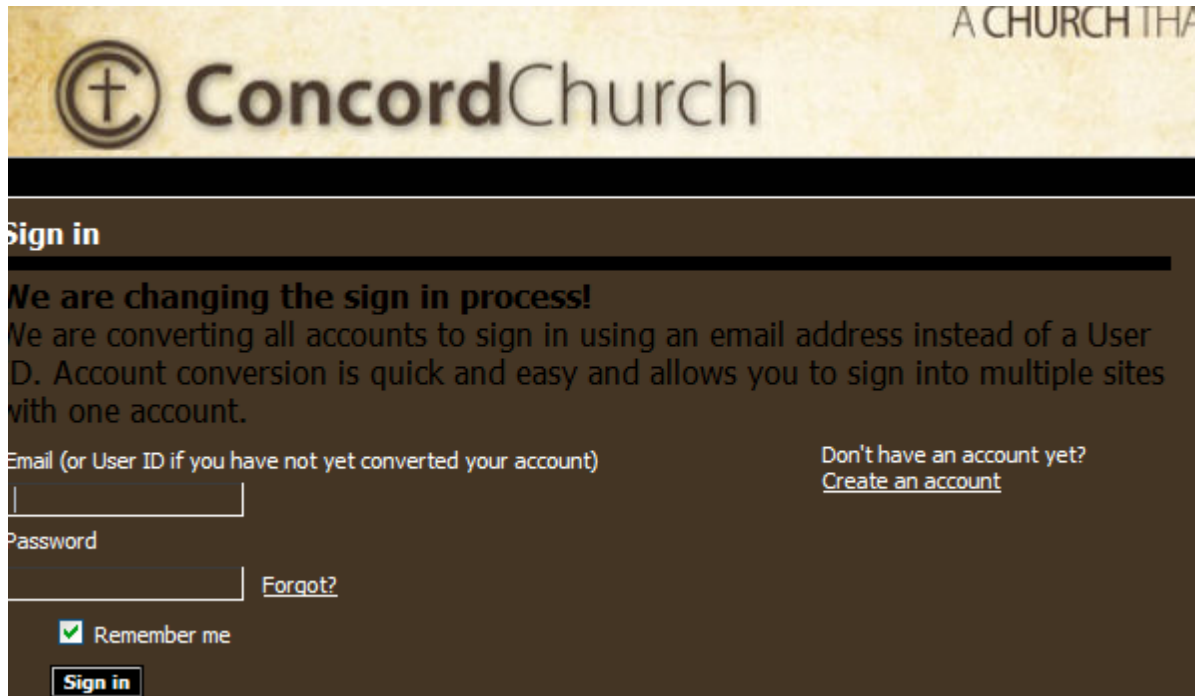
4. Click on the New Link called “**Small Group Manager 2.0**”  
 This will take you to the New Groups 2.0 released from Fellowship One. This Groups 2.0 will give you the ability to Create or edit group details, location or schedule, add people to your group, email group members, edit member details, work a prospective group member task and interact with your group members via bulletin board. **Recent release has also included ability for team members to update their own email address, phone number, and mailing address. All Leaders and members also have the ability to set their privacy settings. As a leader you now have the ability to download a roster via csv or pdf file.**

Note: Direct link to the New Small Groups 2.0 page: <https://cbcdfwtx.infellowship.com/UserLogin>

5. Once you click here it will take you to the NEW SMALL GROUPS 2.0 Website



6. You will need to Log in using your New **InFellowship ID** which is your email address and password that you use when logging into [www.concorddallas.org](http://www.concorddallas.org) -> Group Manager Login.  
 Note: This is also the same email address and password that you use for Online Giving.  
**If you have NOT converted from your User ID per below – You will need to do this first.**
- a. Go to the original Group Manager Sign In link.
  - b. Enter your current Weblink User ID and password. It will then ask you to enter your email address. This needs to be the email address that is already linked in your Fellowship one account.
  - c. Please see F1 Database Administrator if you have forgotten your Weblink User ID and/or email address.



**Sign in**

**We are changing the sign in process!**  
We are converting all accounts to sign in using an email address instead of a User ID. Account conversion is quick and easy and allows you to sign into multiple sites with one account.

Email (or User ID if you have not yet converted your account) [Don't have an account yet? Create an account](#)

Password [Forgot?](#)

Remember me

**Sign in**

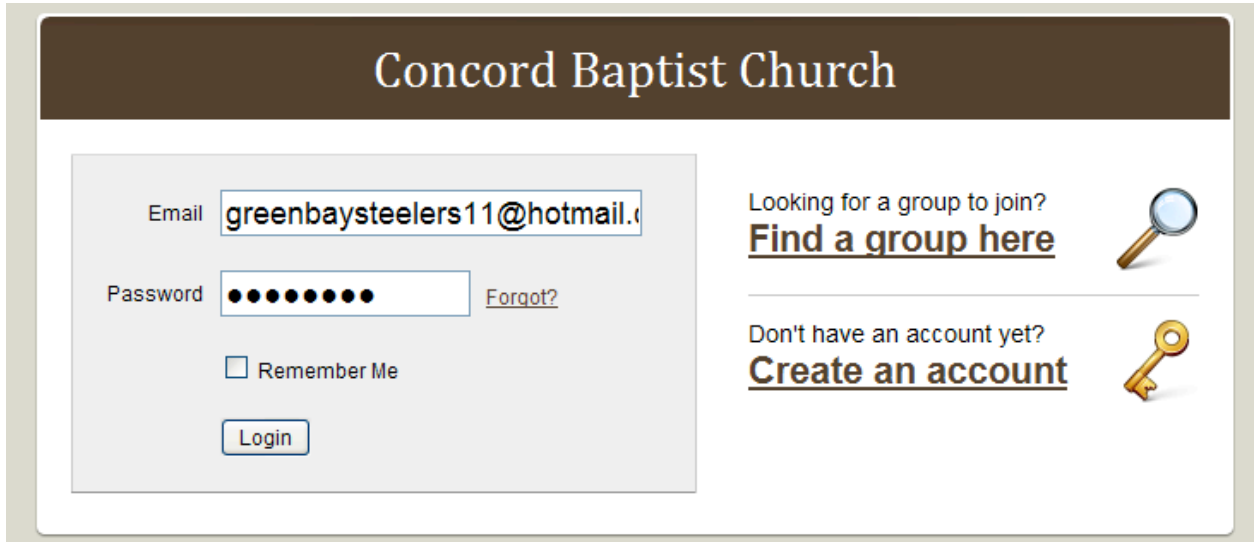
7. Once you have converted to your email address you can now log into the New Small groups 2.0.

**If you NEVER had a Weblink ID nor Online Giving login then you will need to create a new Account.**

8. Click on the Groups Manager 2.0
  - a. Click on the Create an Account link
  - b. Answer the questions by entering your name, email address, password.
  - c. Login to view your information.
  - d. You will then need to contact Small Group Administration team ([smallgroups@concorddallas.org](mailto:smallgroups@concorddallas.org)) to ensure that you are assigned as a leader and can view your group members.

**Logging into New Small Groups 2.0**

9. **Leaders:** Log into the new Small Groups 2.0 website using your email address and password





Concord Baptist Church

Email

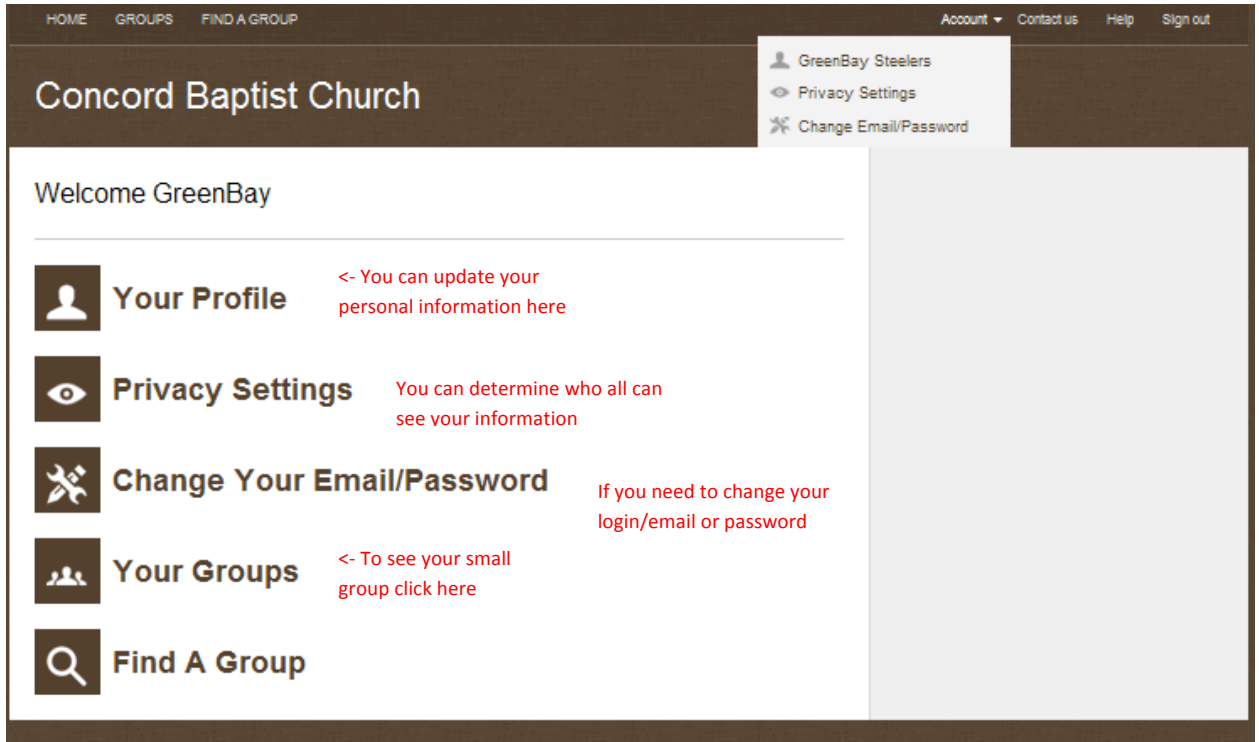
Password  [Forgot?](#)

Remember Me

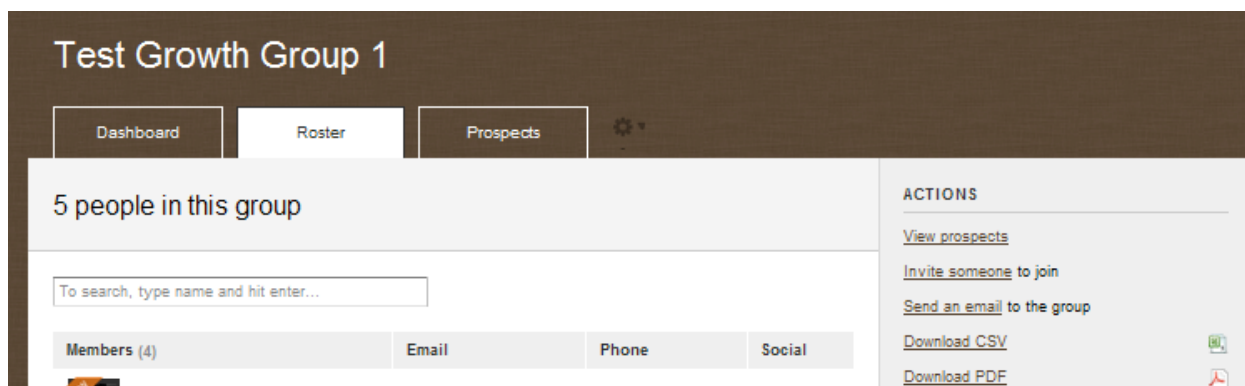
Looking for a group to join?  
**Find a group here** 

Don't have an account yet?  
**Create an account** 

10. Click **Login** button
11. Once you are logged in **as a leader** you will see the following page:  
There are several different actions you can take at this point.  
*Note:* If you are a SG Coach you will see all of the small group leaders (4 – 6 leaders) that you support. If you are a Staff Pastor/Director, you will see all of the groups listed. If you are Small group placement team, you will see all of the groups listed for follow-through purposes.



**Overview of Main Groups 2.0 Page with definitions**



**Under Main Tab:**

**\*\*NEW:** You can download your own Roster now

- Dashboard
  - Dashboard Dashboard - shows the bulletin board that leader can publish notes, schedule, location, and description of the group. You can also see total number of members, prospective members and administrators of small group. Leaders can edit this information as well by using the View Settings tab under Actions.
  
- Roster
  - Roster Roster shows list of your group members
  
- Prospects
  - Prospects Prospects shows list of prospective members who have sent an email to you to join your group or those with whom you have invited to join your group
  
- ⚙️
  - Pinwheel ⚙️ short cut to do the following:
    - 1)Send an email
    - 2)Invite someone
    - 3) Tell a friend – This sends your public group URL to your friend
    - 4) Find a group

**Under Actions** title:

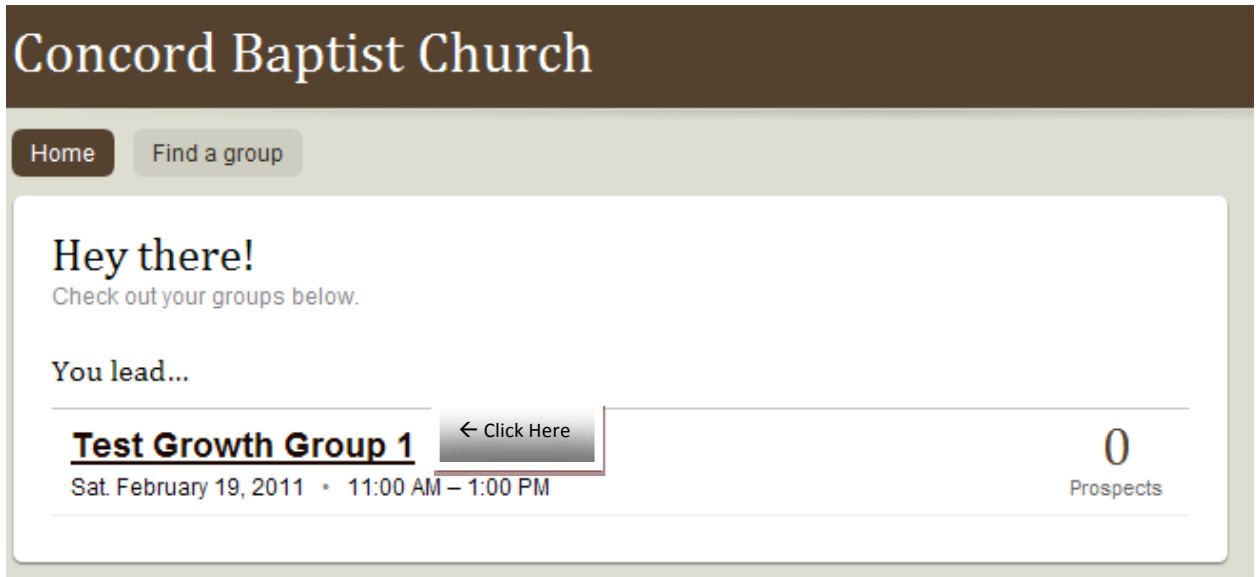
- **View Roster** – lists all of your group members
- **View Settings or Settings button:** You can edit the description of your group, your schedule and location. This is where you would update your Bulletin Board also.
- **Invite someone to join** – You can send an email to someone to join your group
- Send an email to the group

***Under Membership*** Title:

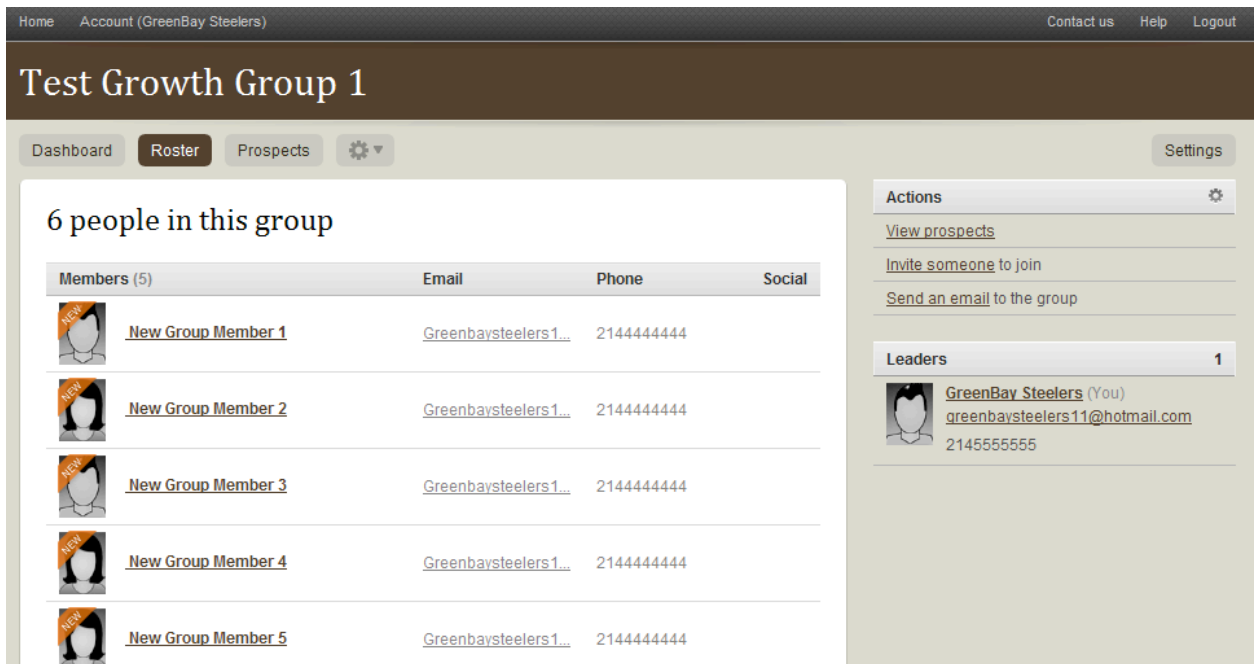
Gives total number of leaders, members and prospects pending approval

**MANAGING YOUR GROUP MEMBERSHIP**

1. Once logged in, click on your Small Group. You will see the following:

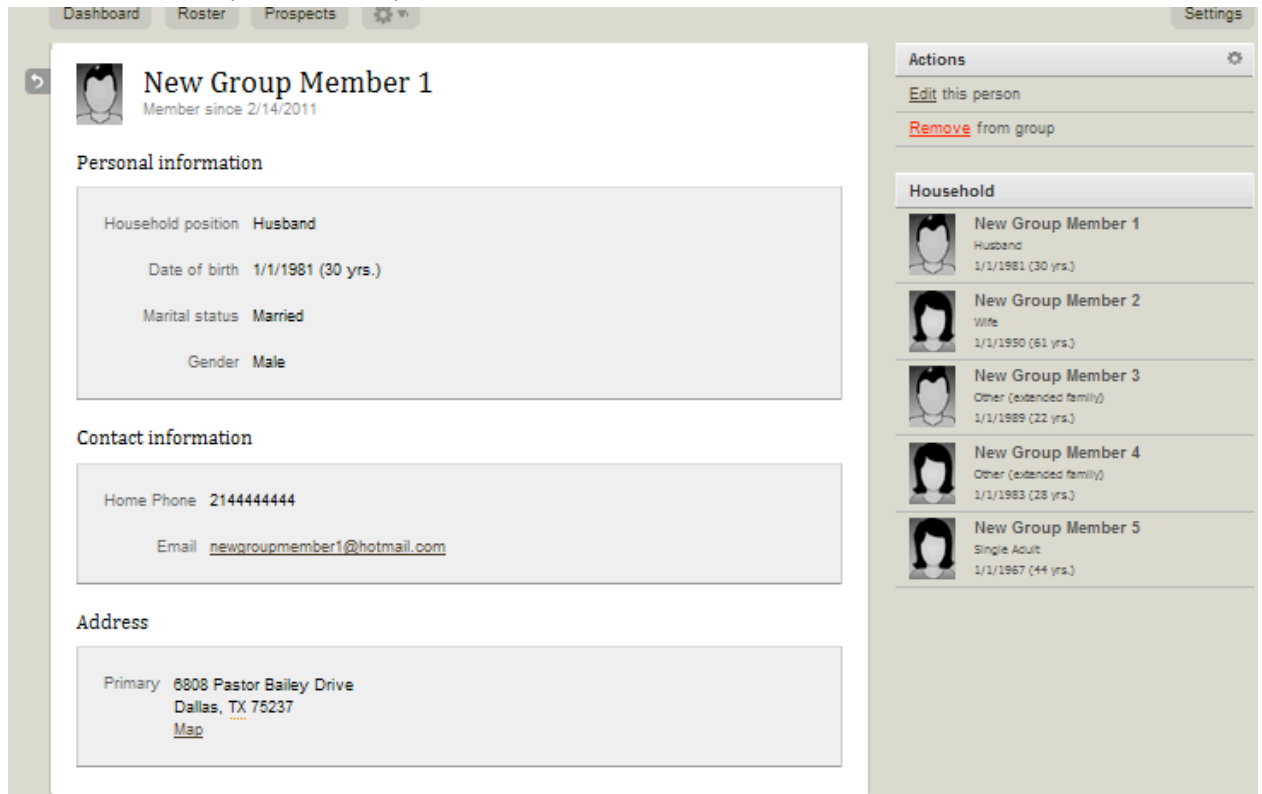


2. Once you click on your small group – it will default to showing your **Roster** of group members (which includes their email address, phone number and social network site link).



**3. Editing Group Member information**

- a. Click on the name you need to update



- b. Under **Actions** tab -> Click **Edit this Person**. You can then edit or add new email address, phone number, and physical mailing address. Note: Please check with each of your group members to ensure that we have their updated information.

You will see the following screen:

Dashboard
Roster
Prospects
⚙️
Settings

### Edit person

New
Group Member 1

First
Last

Change

#### Personal information

Goes by

Household position Husband (required)

Date of birth 1/1/1981 MM / DD / YYYY

Marital status Married

Gender Male

#### Profile

Tell us a little bit about yourself. This will be publicly viewable

(Limit 1500 characters)

#### Contact information

**Phone numbers**

Home Phone
-

+ Add another

**Email addresses**

Email
-

+ Add another

**Web addresses**

Web Address
-

+ Add another

**Social media**

f


http://facebook.com/username

in


http://linkedin.com/in/username or http://linkedin.com/pub/username

t


http://twitter.com/username

#### Person Info

Name	New Group Member 1
Goes by	-
Position	Husband
D.O.B	Jan. 01, 1981
Marital status	Married
Gender	Male
Phone	2144444444 Home Phone
E-mail	newgroupmember1@hotmail.com Email
Web	-
Social	-
Address	6808 Pastor Bailey Drive Dallas, TX 75237 United States

- c. Click **Save Changes**
- d. This updates this person information within the Concord Church main database system.

**4. Removing a group member from your list**

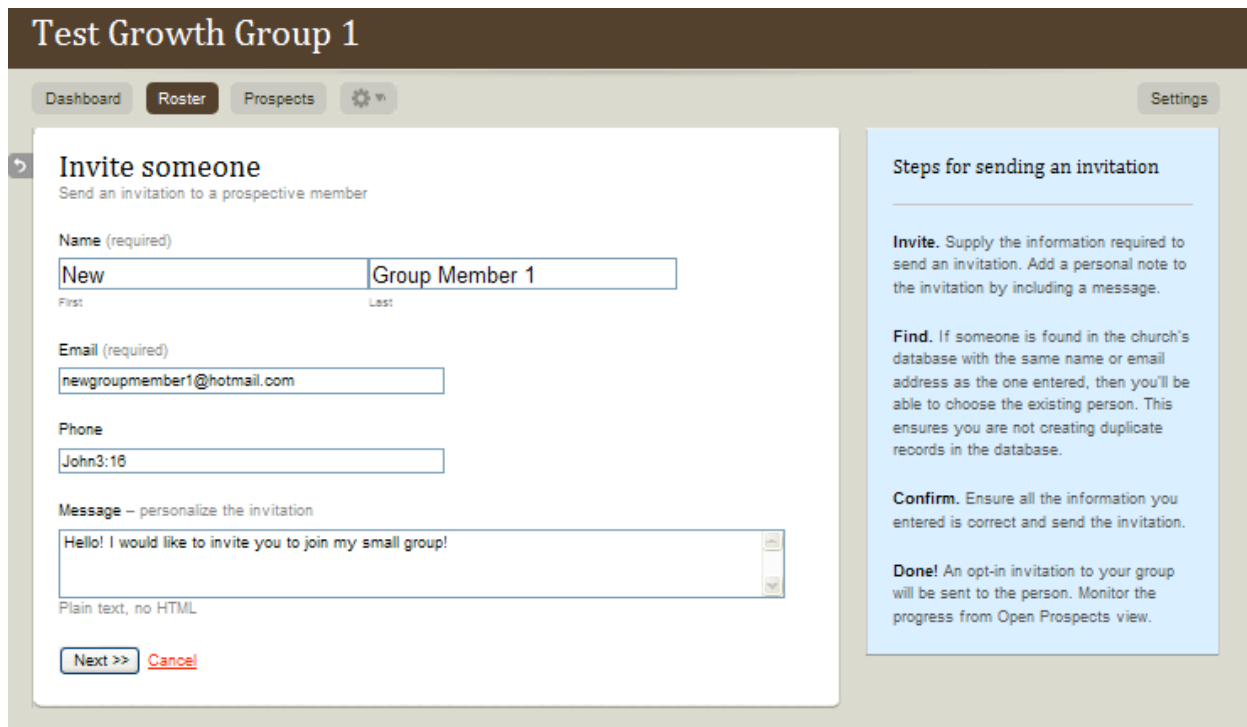
- a. Similar to above, Click on the name you need to update
- b. Under Actions -> remove from group

- c. It will ask you “are you sure you want to remove this person from your group?”
  - d. Once it is removed, it will show you your updated Roster without that person.
- Note: This does NOT remove the person from Concord’s main database just your group.

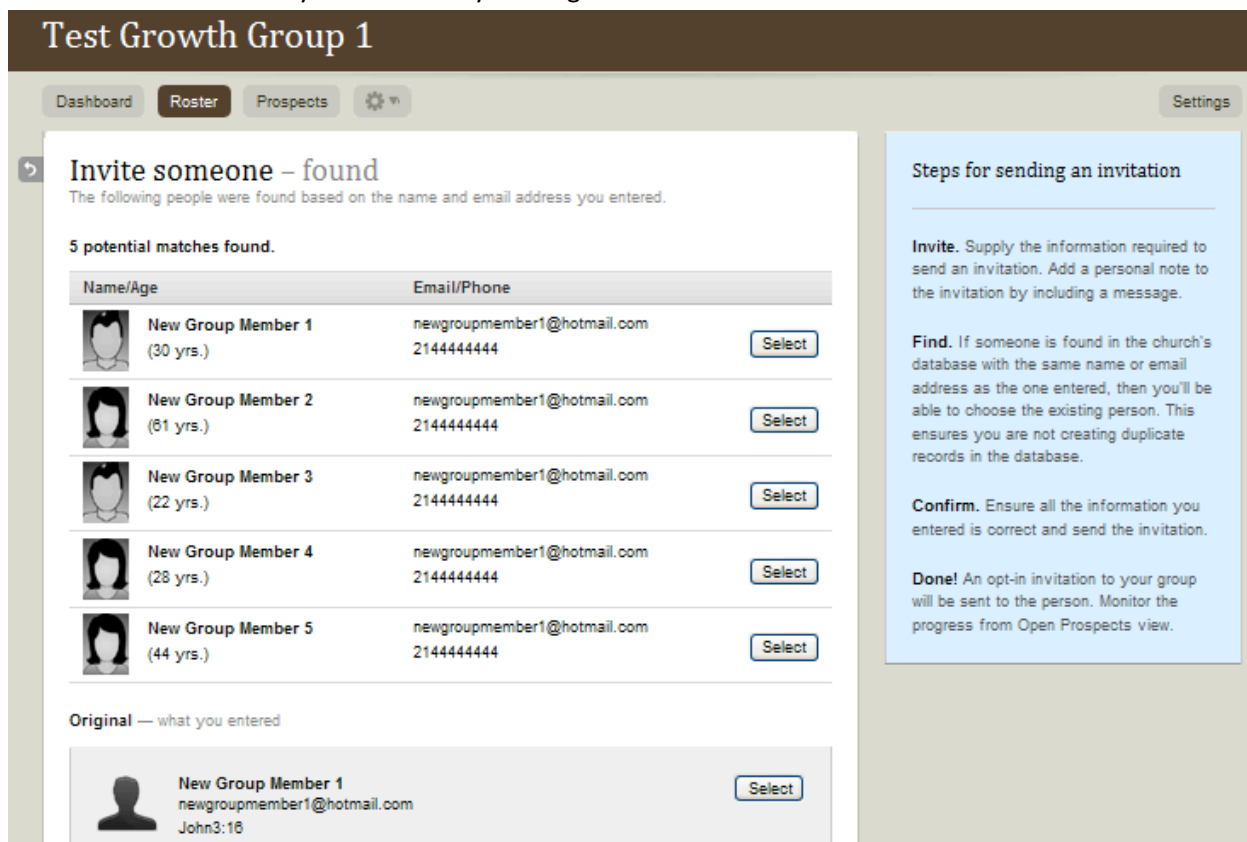
**If you do remove someone from your group, please send that person’s name to [smallgroups@concorddallas.org](mailto:smallgroups@concorddallas.org)**

**5. Invite Someone to join the group**

- a. Under Actions -> Select **Invite Someone to join**
- b. Input the name, email address (required), phone number (optional) and a personal note to that person



- c. Click **Next** – If that member is found based on name and email address then hit **Select** next to the name. Otherwise you can select your original.



- d. **Select** the person. *Note: In this case I selected the First option.*

- e. Next screen summarizes what you will be sending to this person

**Test Growth Group 1**

Dashboard Roster Prospects Settings

**Invite someone – confirm**  
Ensure the following information is correct before sending the invitation.

Name: New Group Member 1  
 Email: newgroupmember1@hotmail.com  
 Phone: 2144444444  
 Message: Hello! I would like to invite you to join my small group!

Send invitation Start over

**Steps for sending an invitation**

**Invite.** Supply the information required to send an invitation. Add a personal note to the invitation by including a message.

**Find.** If someone is found in the church's database with the same name or email address as the one entered, then you'll be able to choose the existing person. This ensures you are not creating duplicate records in the database.

**Confirm.** Ensure all the information you entered is correct and send the invitation.

**Done!** An opt-in invitation to your group will be sent to the person. Monitor the progress from Open Prospects view.

- f. Click **Send Invitation**
- g. Note: Once you send this invitation you will have a new Prospect.

**Test Growth Group 1**

Dashboard Roster Prospects (1) Settings

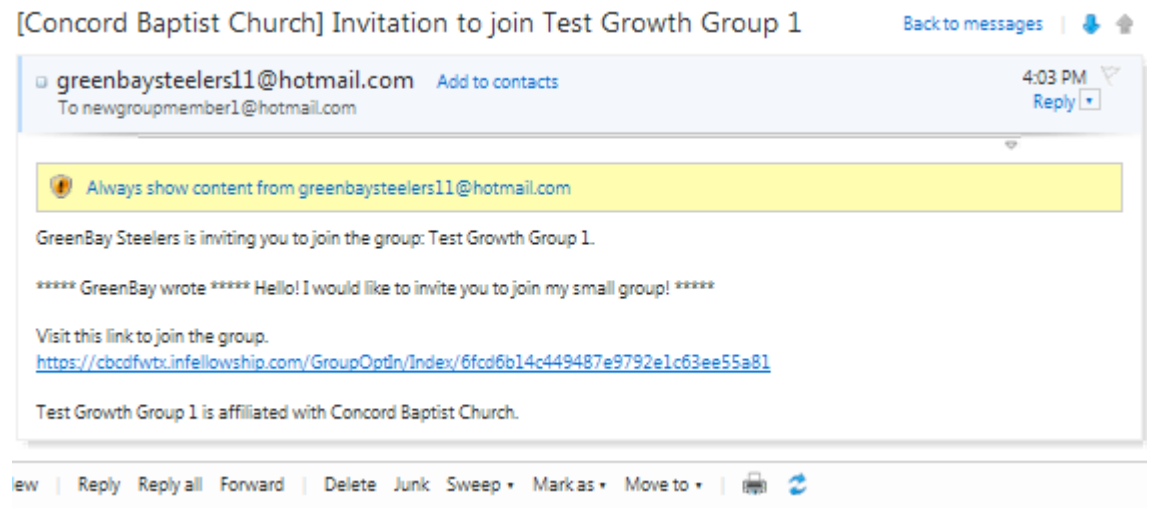
**1 prospects**

Name	Last contacted	Open	Status
<a href="#">New Group Member 1</a>	Waiting to be contacted	Today at 4:03 PM	Invited

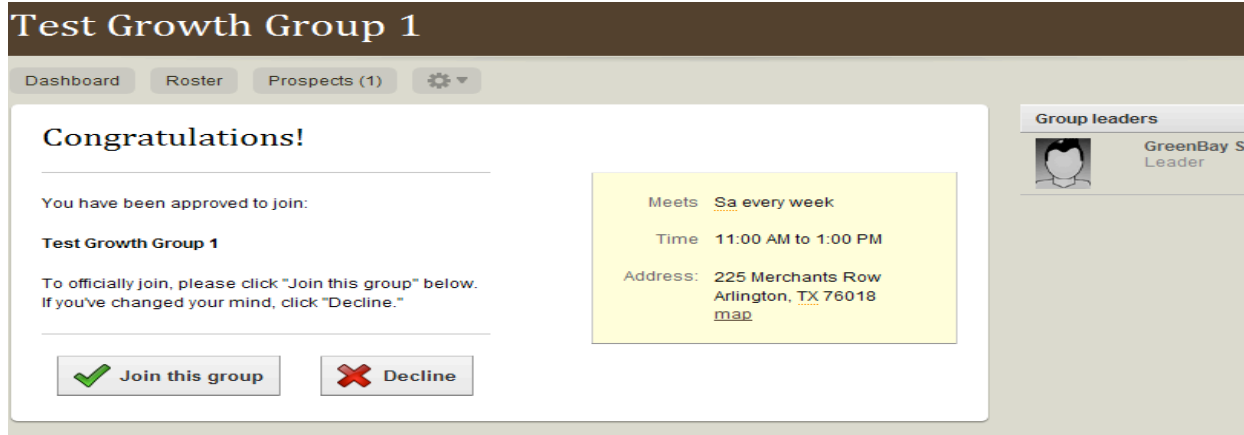
**Leaders 1**

[GreenBay Steelers \(You\)](#)  
[greenbaysteelers1...](#)  
 2145555555

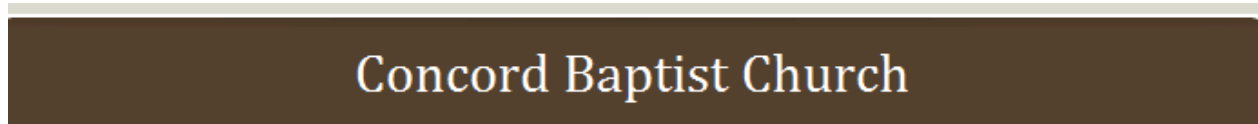
Note: Below is a sample of what the email will look like to that prospective member in their email account.



- h. When the new prospective member click on the link they will see the following:  
Once they accept then they will be part of your small group. Since you invited them then there is no need for you to approve them.



- i. Once they Hit "Join this group" – if they do not have an account on Fellowship One then they will be asked to create one as follows:



Almost done...

In order to join this group, you will need to create an account. \* = required field

Your name **New Group Member 1**

Your email **newgroupmember1@hotmail.com**  
Note: This will be used as your primary account login. Don't worry, you can change it later.

\* Password

\* Confirm password

Note: Now this invited prospect is now a member.

**6. Accepting or Rejecting Prospective Members**

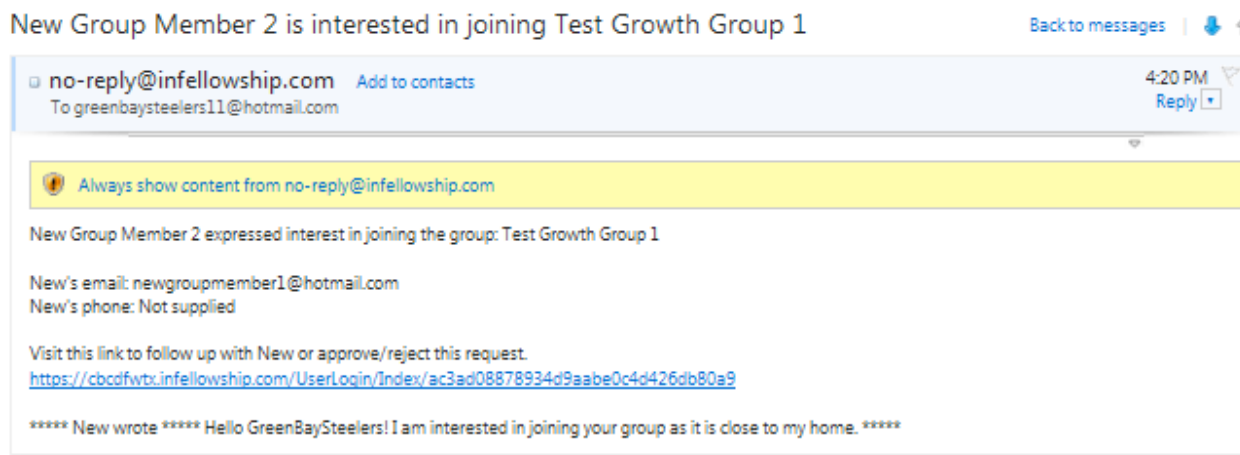
*Note: Prospective member can search on this new Small Groups 2.0 and send the group leader an email to join your small group. Example of screen below:*



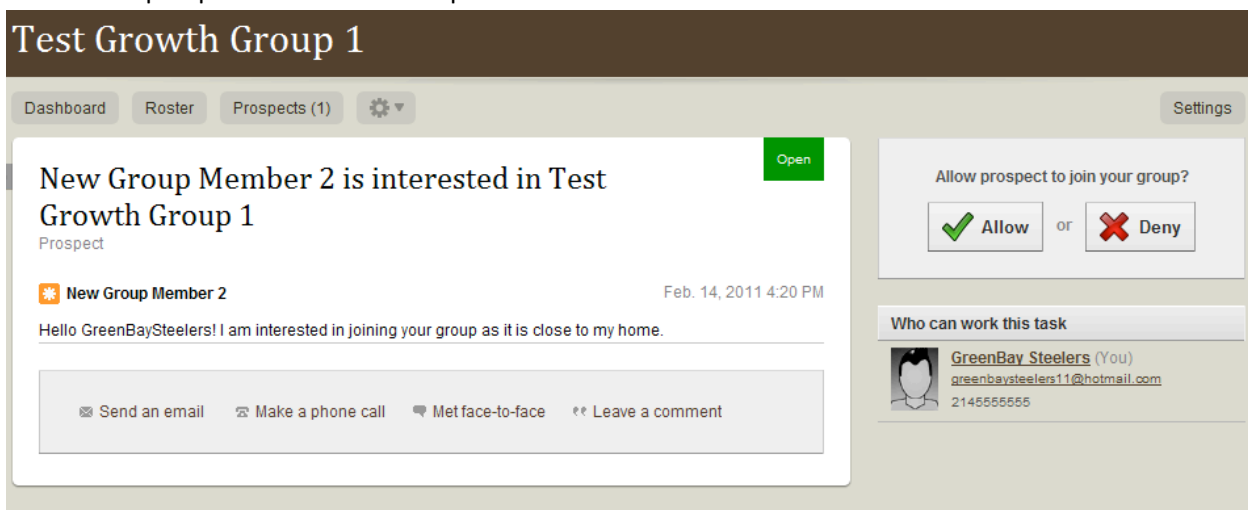
*Once they Hit Send – It will give them a general note that you as the leader will be contacting them.*

**ACCEPTING PROSPECTIVE MEMBERS**

- a. **SG Leaders:** You will receive an email notification that a new member is interested in joining your group. Email will look like this:



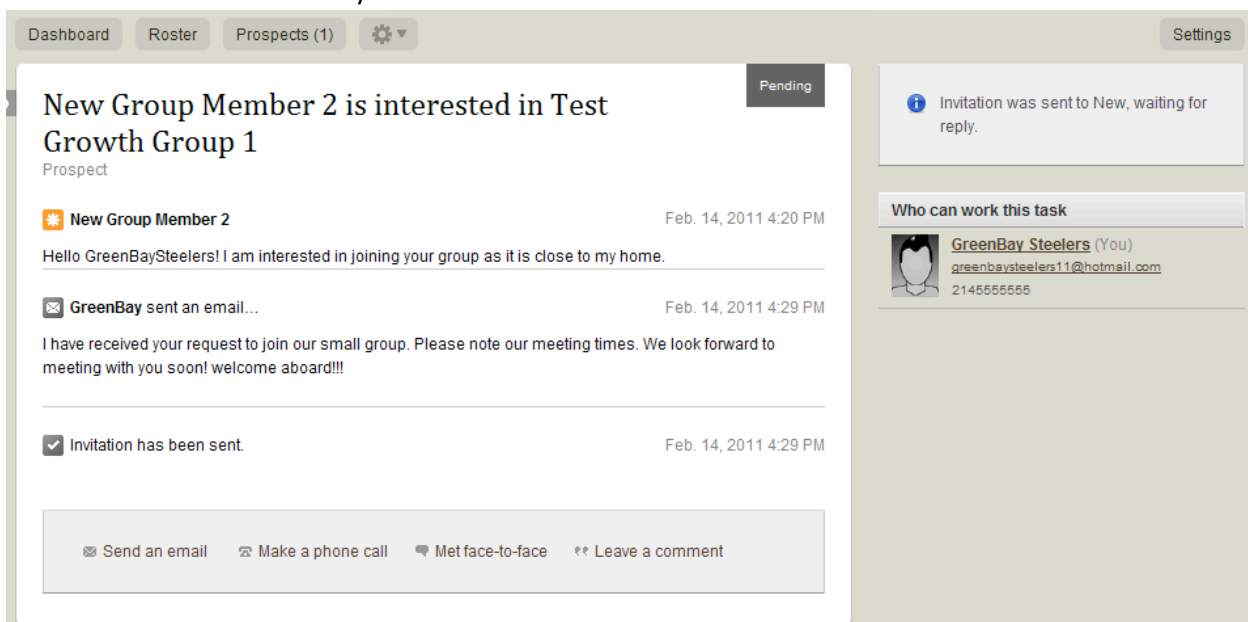
- b. You can click on the link within your email to approve or reject this request.
- c. Once you log into your account, go to **Prospects**.
- d. Review the prospects information request.



- e. You can send an email, make a phone call or set up a face-to-face meeting. Be sure to enter any necessary comments. This can be viewed by SG Pastor and Coordinator.  
*Note: For Community Groups, please make sure you send the new member your physical address*

f. You can Click **Approve** now

It will then show the summary of what has been done so far for this contact:



- g. It will send another email to the prospective member requesting that they accept by clicking on the link which will take them to the following page:

**Test Growth Group 1**

Dashboard Roster Prospects (1) ⚙️

### Congratulations!

You have been approved to join:

**Test Growth Group 1**

To officially join, please click "Join this group" below.  
If you've changed your mind, click "Decline."

Meets: **Sa every week**

Time: **11:00 AM to 1:00 PM**

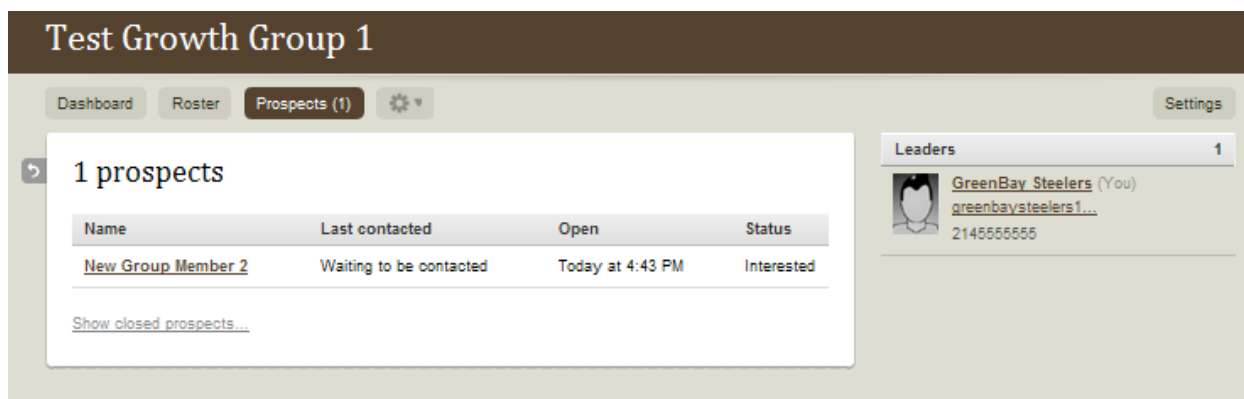
Address: **225 Merchants Row**  
**Arlington, TX 76018**  
[map](#)

**Group leaders**

**GreenBay Steelers**  
Leader

*Note: The prospective member can also decline the offer. This will keep the person off of your roster. Once they join they are now listed as Member not Prospect. You can always go back to review "Closed Prospects" and the communication.*

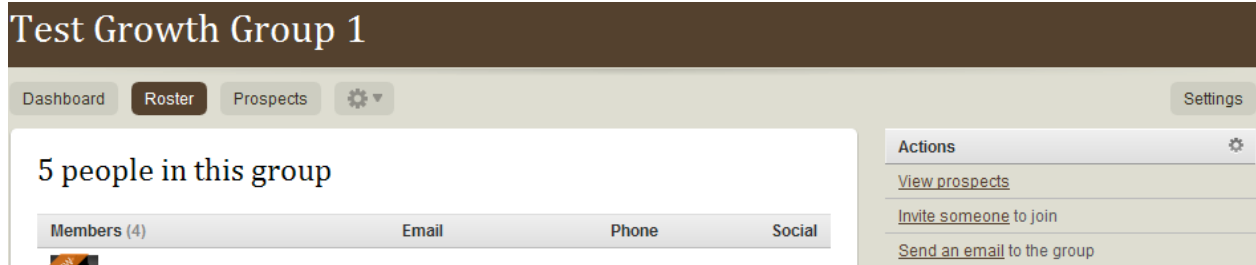
**REJECTING PROSPECTIVE MEMBERS**



- You will receive an email notification, thus you can click on the link within your email to approve or reject this request.
- Before** you Click the **Reject** button. **Please send an email to prospect explaining that your group is closed and the circumstances for the rejection.**
- Please send email with person’s name to the Small Group Placement Team: [smallgroups@concorddallas.org](mailto:smallgroups@concorddallas.org)
- Click **Reject** – you must enter an explanation.

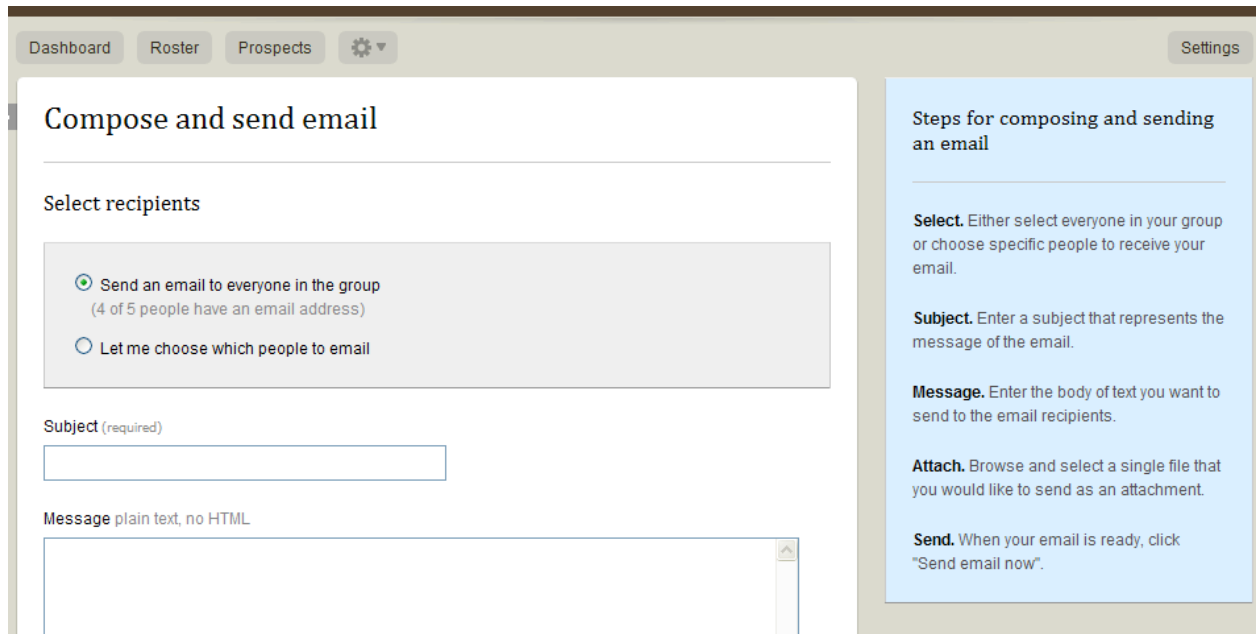


- Once you hit **Deny this person**. The person will be removed from your prospect list and will not be on your member list



**7. Emailing your group members**

- a. Under Actions tab -> Click on “Send an email to the group”
- b. Once you click there then you will see the following: “compose and send email.” You can either send to entire group or to selected persons within your group.



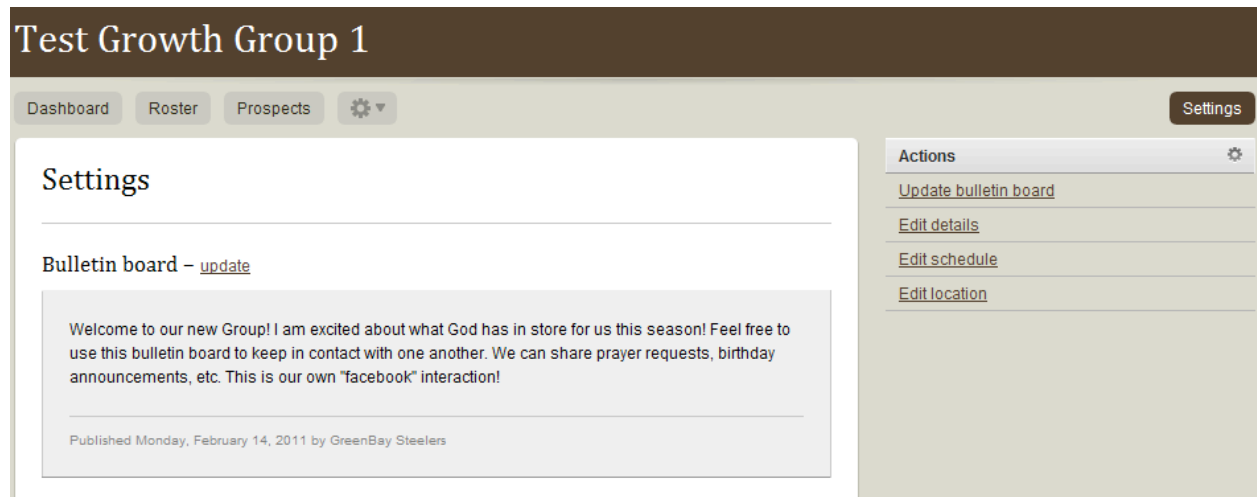
- c. Enter your subject line and message for your group members
- d. Once you are complete then hit **Send email now**

**Note:** Please be sure to proof-read your message before sending.

[Cancel](#)

**8. Publishing Dashboard Information to your group**

- a. Sign into your account
- b. Click the **Dashboard** option
- c. Under the **Actions** tab -> Click **View Settings**



- d. Under **Actions** tab -> Click **Update Bulletin Board**. The bulletin board editor appears
- e. Type the message in the text box.
- f. Under Publish. Select the **“Yes, show this on the dashboard”** check box to show the messages to your group members

**Test Growth Group 1**

Dashboard Roster Prospects Settings

### Bulletin Board

Keep the group informed with the latest happenings.

What would you like to post?

Welcome to our new Group! I am excited about what God has in store for us this season! Feel free to use this bulletin board to keep in contact with one another. We can share prayer requests, birthday announcements, etc. This is our own "facebook" interaction!

Markdown can be used for minimal formatting.

**Publish**

Yes, show this on the dashboard

Save Changes Cancel

**Information**

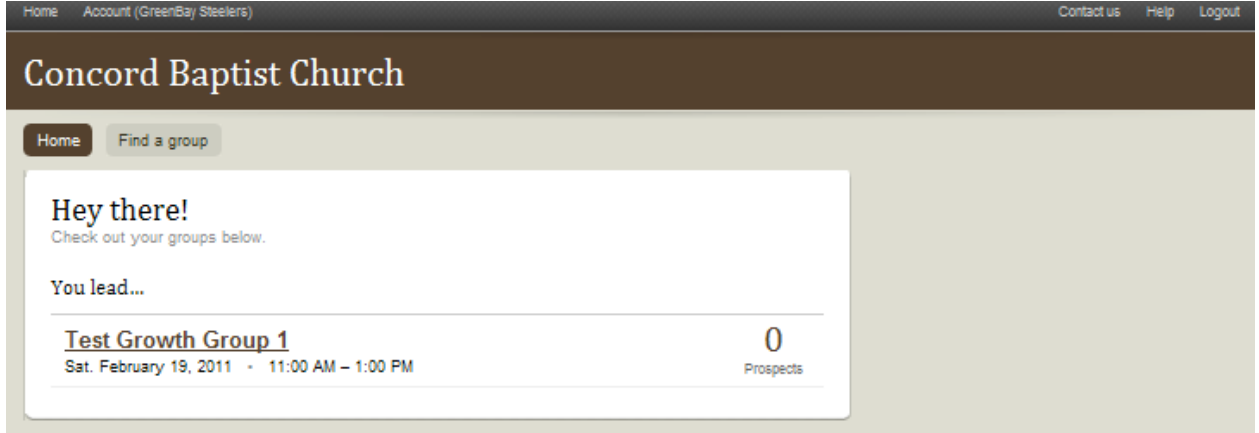
Author: GreenBay Steelers

Published: 2/14/2011 • 1:02 PM

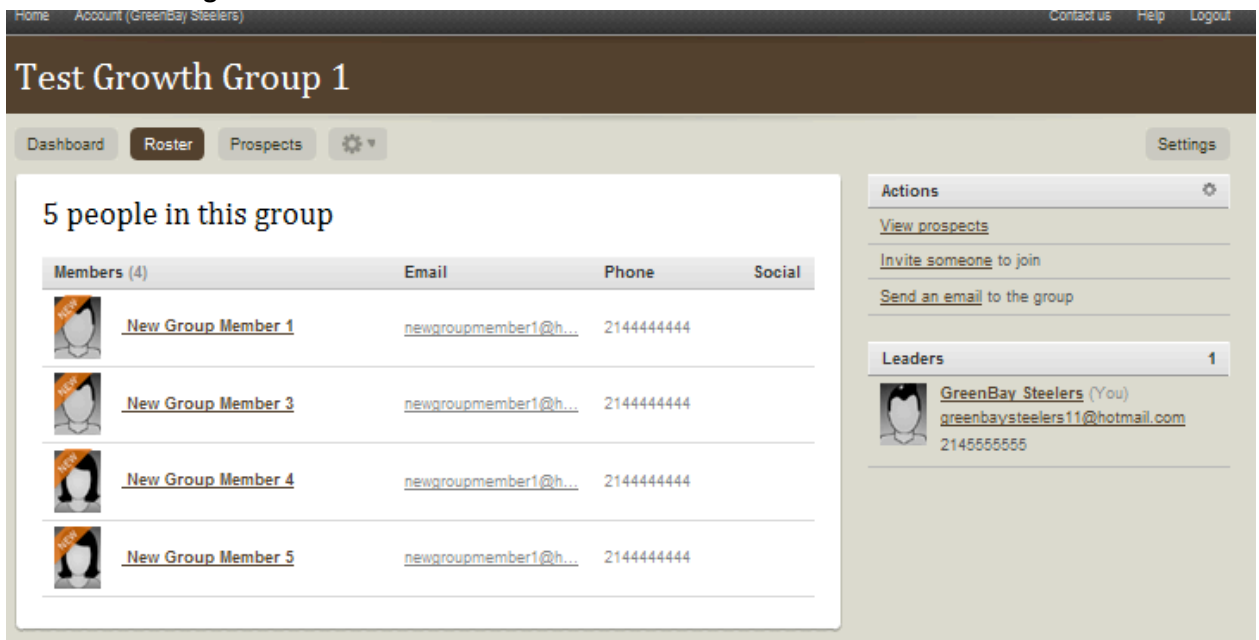
Last updated: 2/14/2011 • 1:02 PM

- g. Click **Save changes** to publish

- 9. Closing your group so that no one else can join
  - a. Log into your account
  - b. Click on the Group that you want to change



- c. Click on **Settings** button



- f. Click **Edit Details** button

The screenshot displays the 'Settings' page for a group named 'Test Growth Group 1'. At the top, there is a navigation bar with buttons for 'Dashboard', 'Roster', 'Prospects', and 'Settings'. Below this, the main content area is titled 'Settings' and contains two primary sections: 'Bulletin board' and 'Details'. The 'Bulletin board' section shows a message: 'Welcome to our new Group! I am excited about what God has in store for us this season! Feel free to use this bulletin board to keep in contact with one another. We can share prayer requests, birthday announcements, etc. This is our own "facebook" interaction!' published on Monday, February 14, 2011. The 'Details' section lists various group attributes: Name (Test Growth Group 1), Time zone (GMT-06:00 Central Time (US & Canada)), Description (This is a bogus group for training purposes only. DO NOT assign real people to this group), Marital status (Married or Single), Gender (Coed), and Age range. On the right side, there is a sidebar with an 'Actions' menu containing links for 'Update bulletin board', 'Edit details', 'Edit schedule', and 'Edit location'.

- g. Uncheck the Box that says **“This group is searchable”**

**Test Growth Group 1**

Dashboard Roster Prospects Settings

### Edit this group

**Name (required)**

**Time zone (required)**

**Description**

**Marital Status**  **Gender**  **Age Range**  to

Childcare is provided  
 This group is searchable

Original	
Name	Test Growth Group 1
Time zone	(GMT-06:00) Central Time (US & Canada)
Description	This is a bogus group for training purposes only. DO NOT assign real people to this group
Marital Status	Married or Single
Gender	Coed
Age Range	--
Searchable	✓

- h. Click **Save Changes**
- i. Also, Send an email to SG Coordinator ([smallgroups@concorddallas.org](mailto:smallgroups@concorddallas.org)) so that they can “Lock your group”
  - a. For SG Coordinator, log into [www.fellowshipone.com](http://www.fellowshipone.com)
  - b. Go to Groups -> Groups by Group Type -> View All
  - c. Click on Edit Group Details under the Actions tab
  - d. Uncheck the box “Unlock group” (Allow members to be added)

**Unlock group** (Allow members to be added)

This group is searchable

[Cancel](#)