



TouchPoint Software
User Experience Storyboards:

The Basics for Managing Your Grow Group

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TouchPoint Software
User Experience Storyboard:
Logging In

Logging In



Microsoft Edge



Safari



Mozilla Firefox



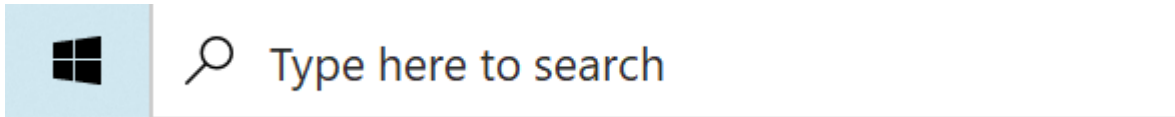
Internet Explorer



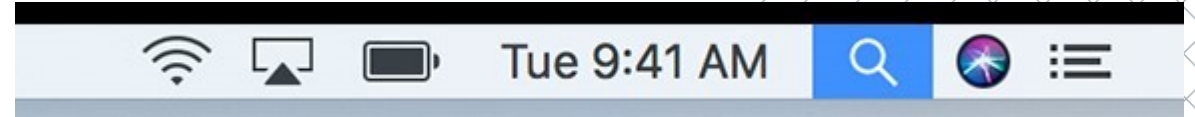
Google Chrome



Opera



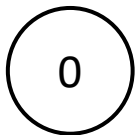
Windows 10 Search Bar



MacBook Search Bar

On your Computer, open a new webpage in your browser of choice.
(Double-Clicking on your browser icon will open up a new webpage for you.)

(If you're not sure what browser you have, you can search for one of the names above, in your computer's Search Bar.)



Logging In



android 



 iPhone

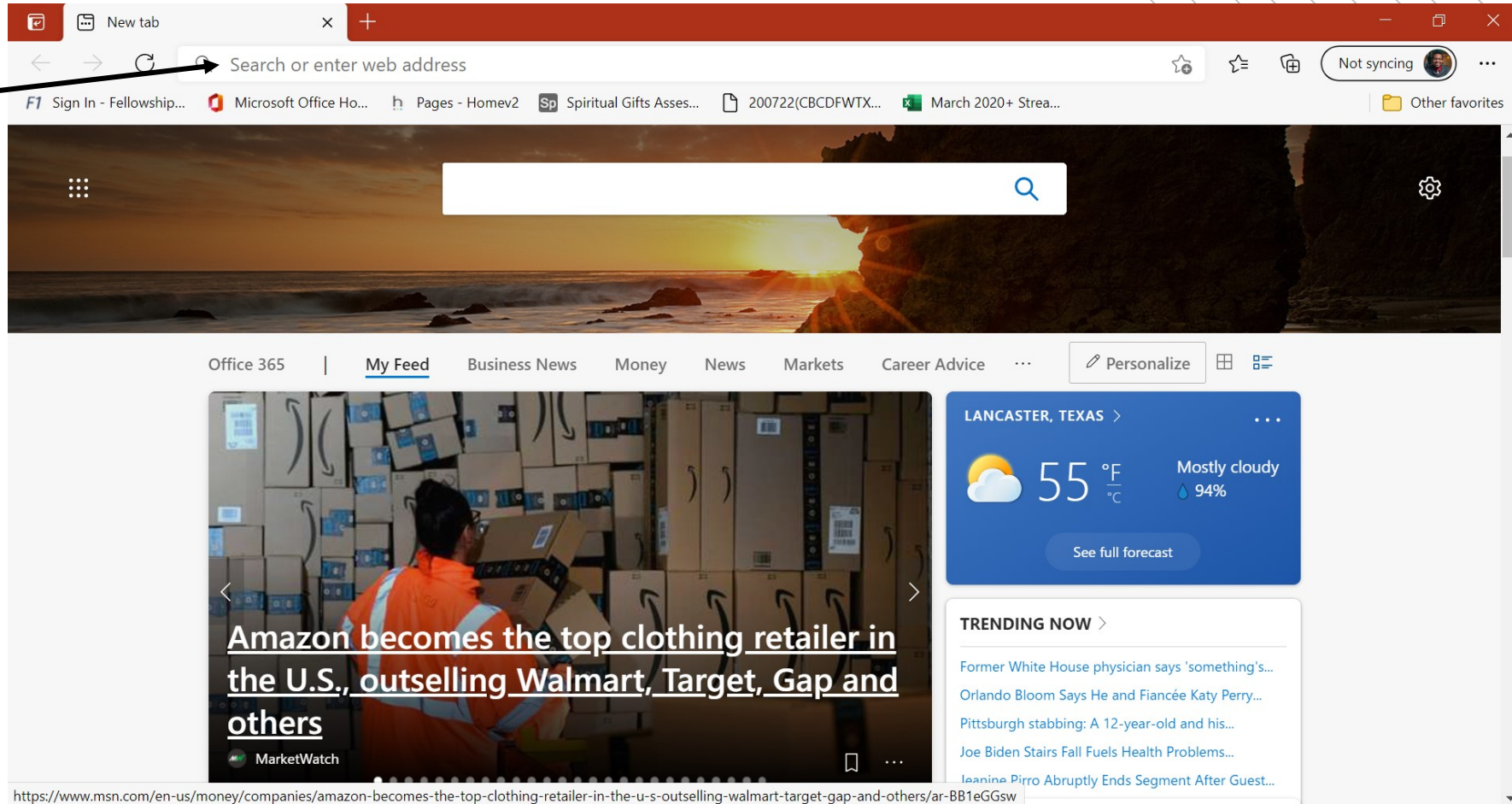


0*

You can also open a new webpage on your smart phone.
(Be aware, though the content will be the same, the screen layout will differ.)

Logging In

1

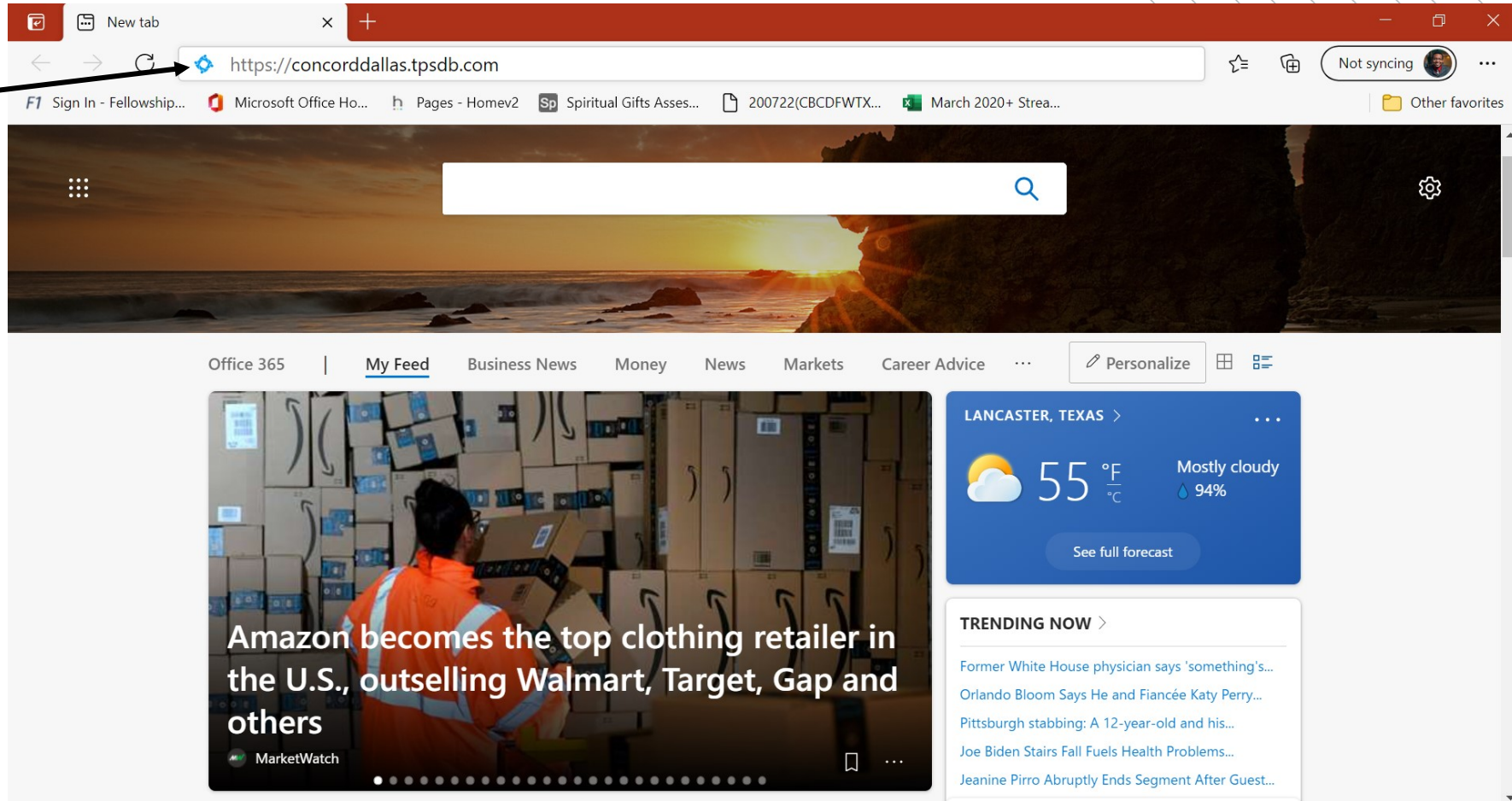


1

Once you have opened a new browser window, click on the URL Search Bar at the top of your screen.

Logging In

2

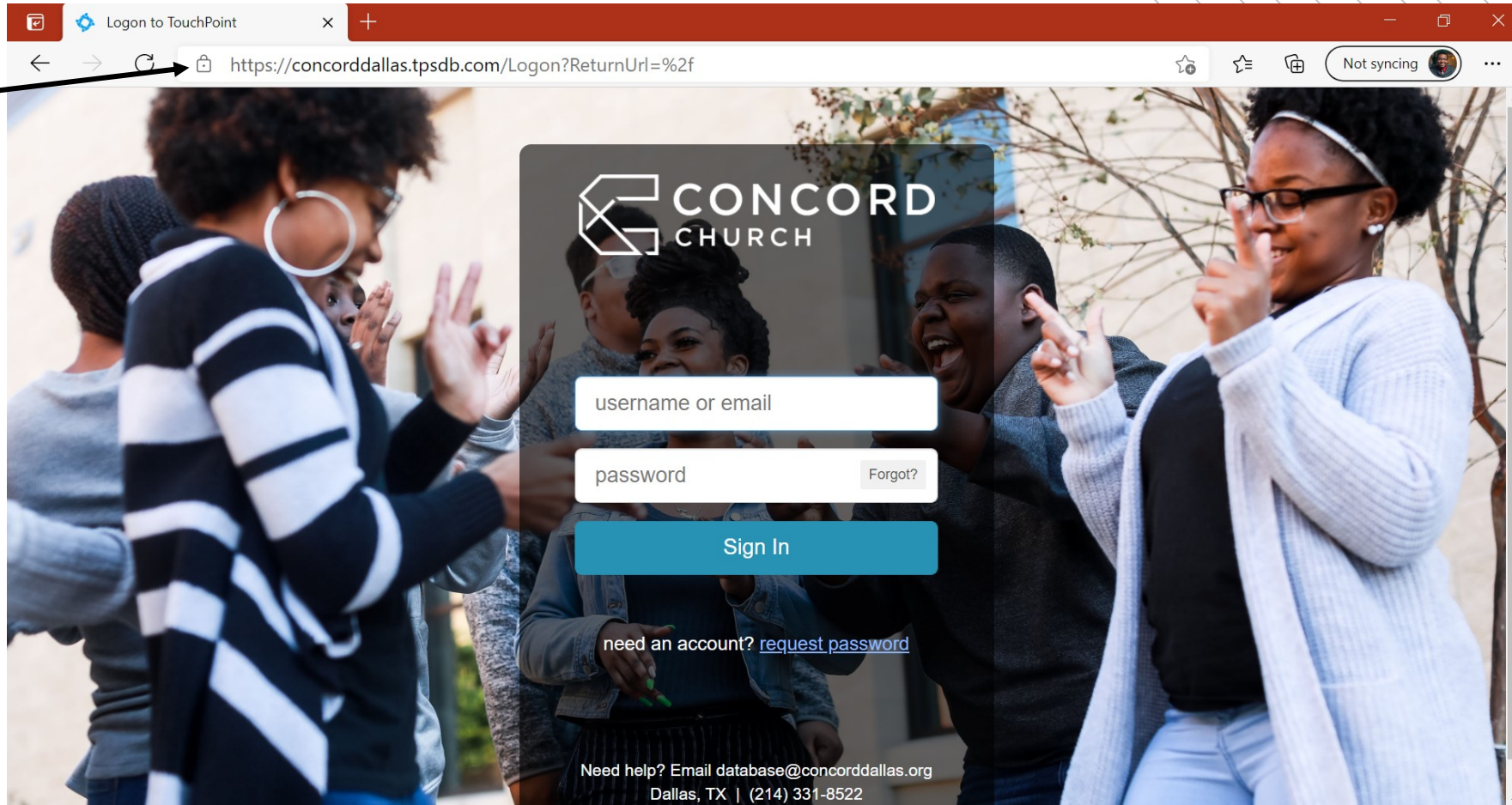


2

In your URL Bar, type <https://concorddallas.tpsdb.com>.

Logging In

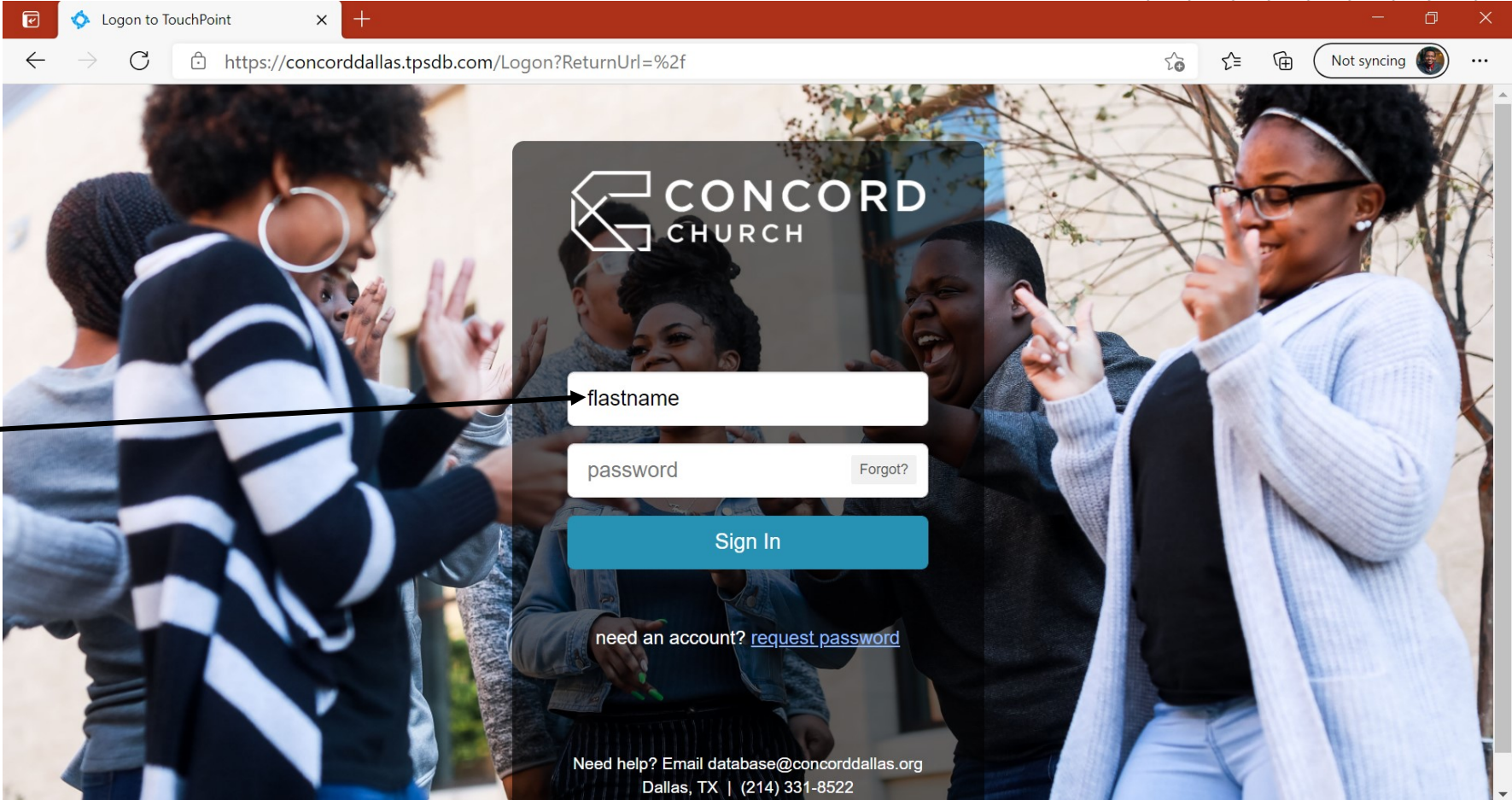
3



3

Hit the “Enter” button, to be taken to the TouchPoint Login page.

Logging In



4

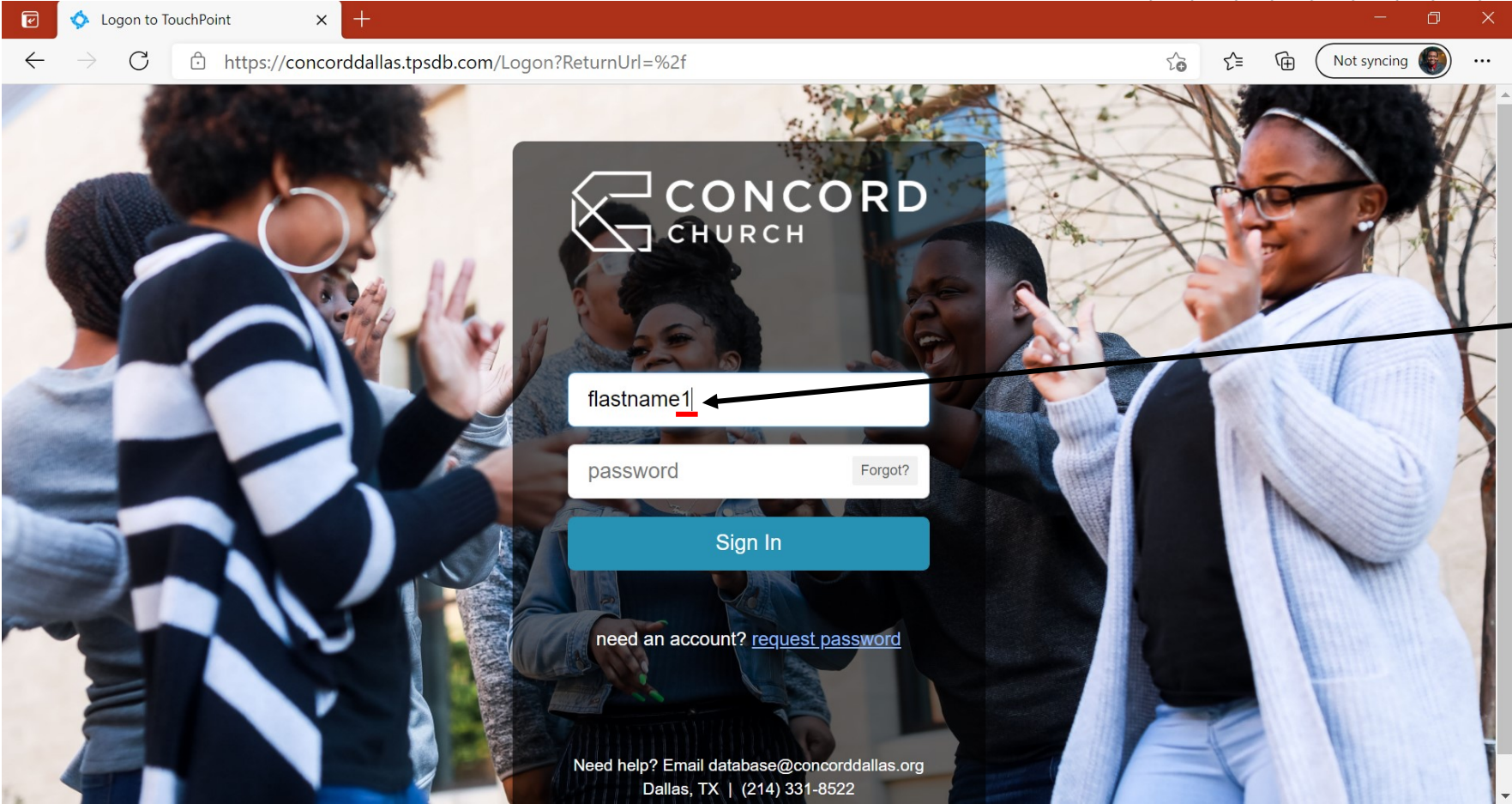


4

In the first box, type in your username.
Your username is your First Letter of your First Name followed by your full Last Name.

Example:
Real Name: John Doe
Username: JDoe

Logging In

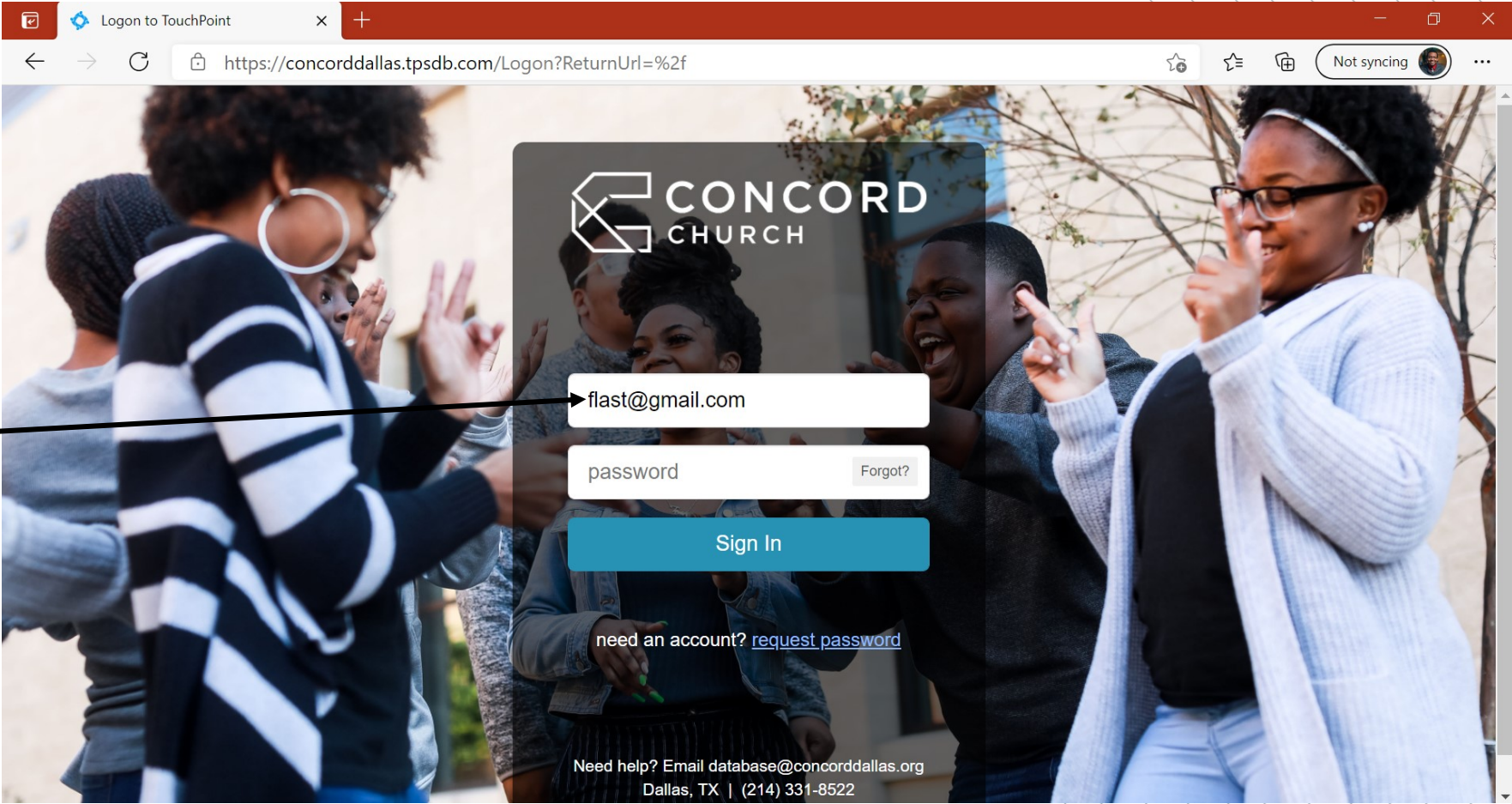


4*

Depending on your name, you may need to add a number to the end of your username.

If you're unsure and want to know specifically what your username is, please contact database@concorddallas.org.

Logging In



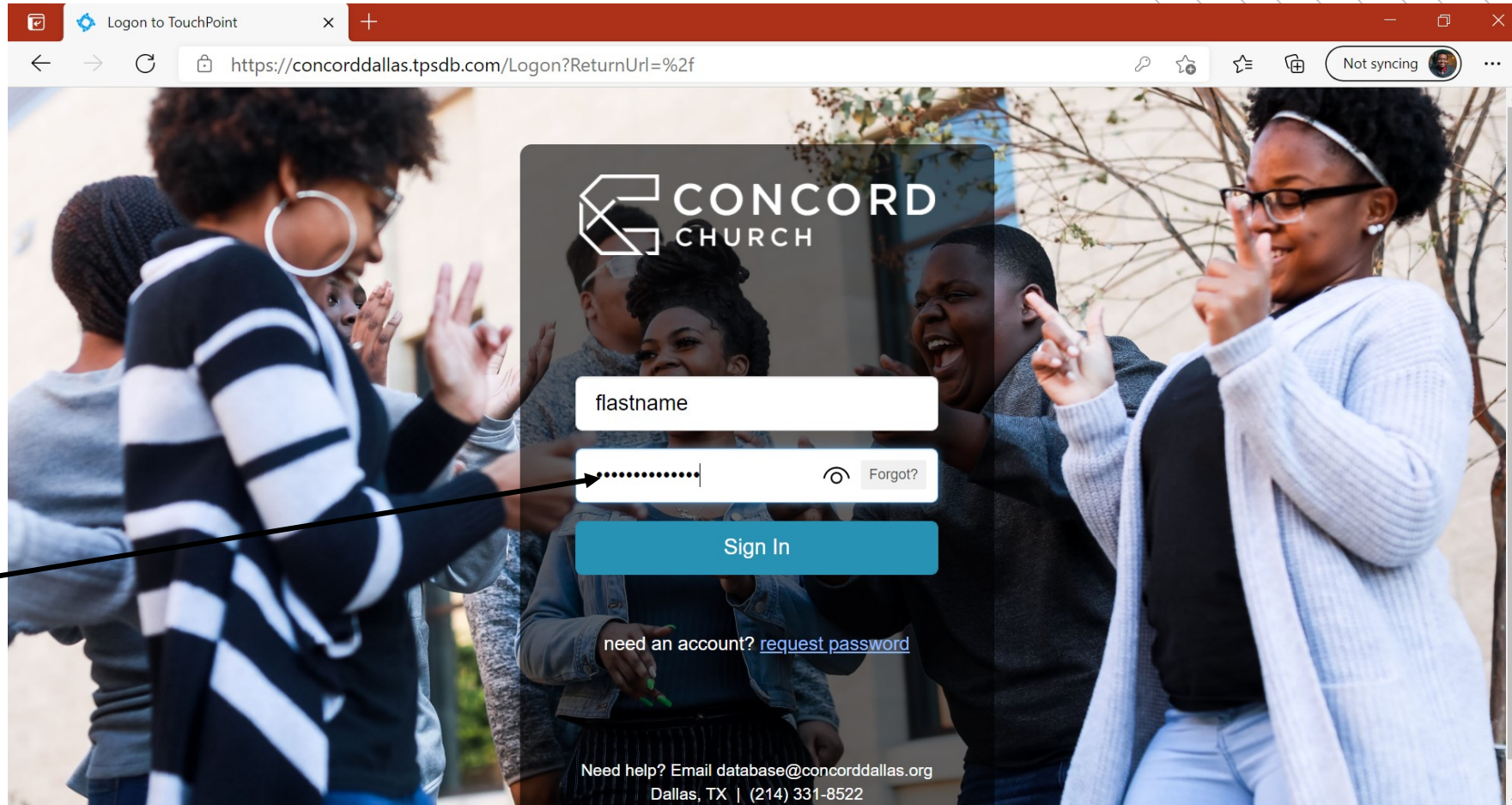
4**



4**

Also, if you had a previous account in Fellowship One / InFellowship and this is your **first time logging in**: you may also try your email associated with your F1 account.

Logging In



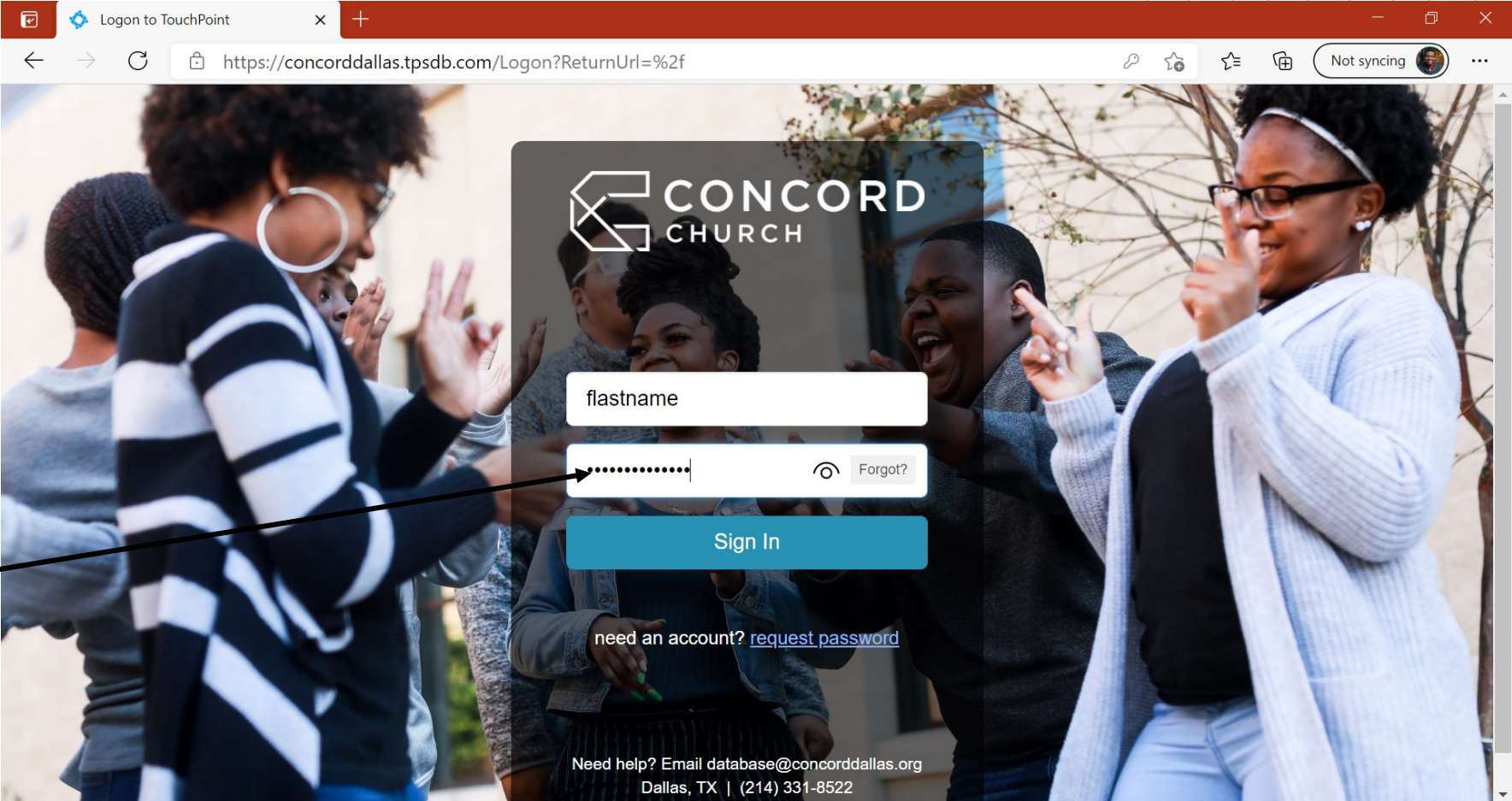
5



5

Type your Password into the second box.

Logging In



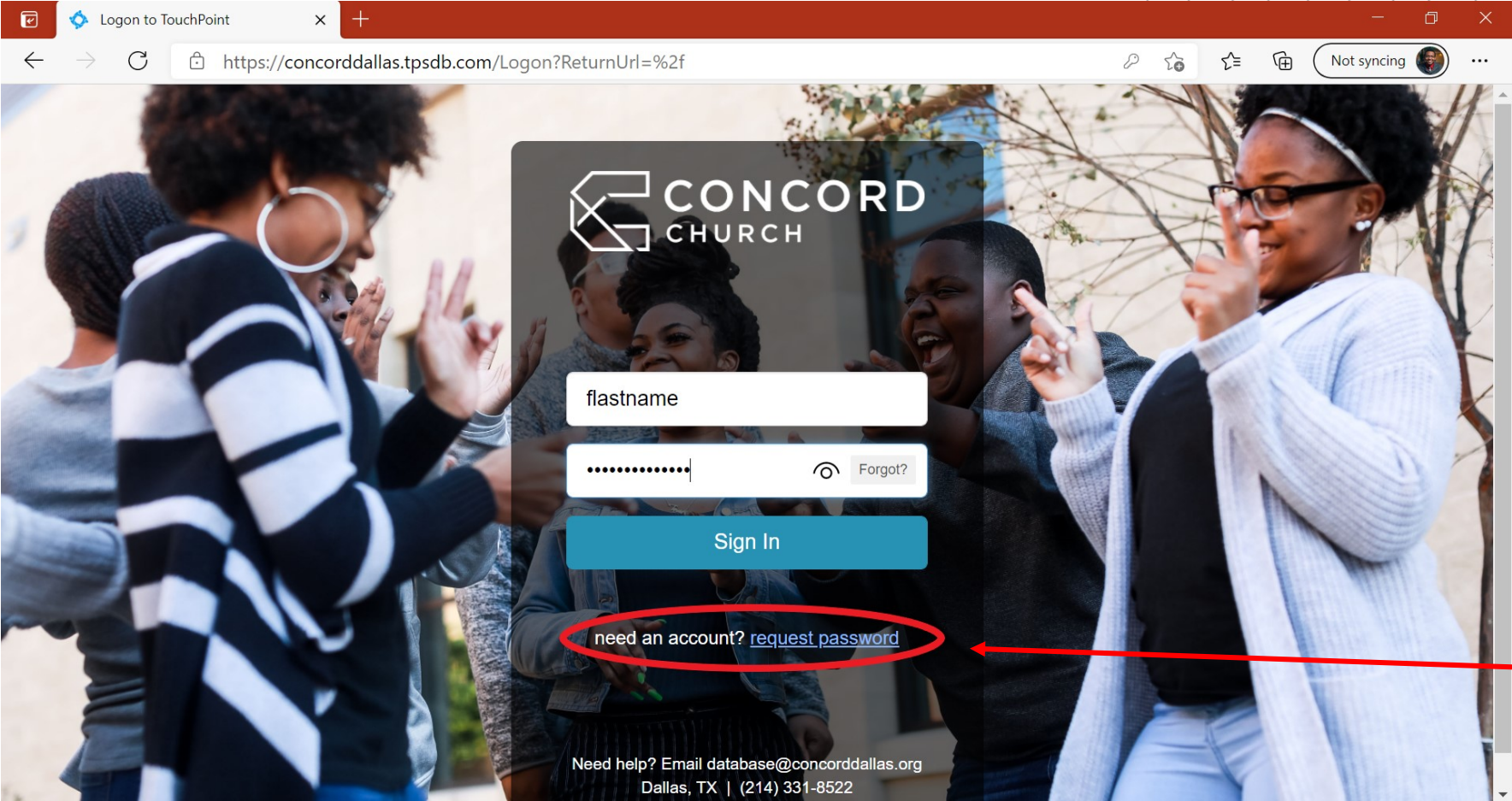
5*



5*

If you had an account in Fellowship One, and this is your **very first time** logging in, your Password will automatically set to "Touchpoint123!"

Logging In

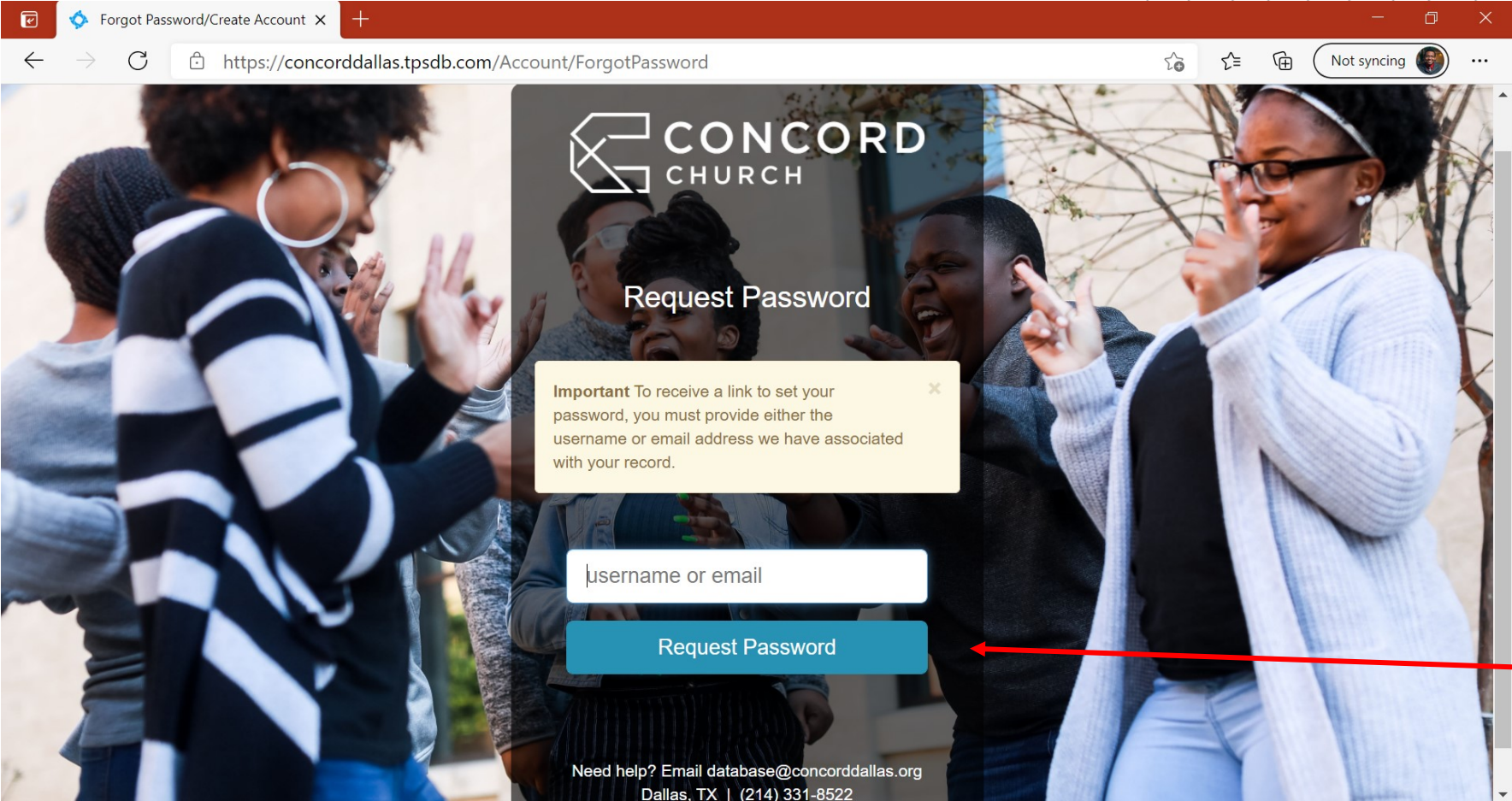


5**

If you've forgotten or need to reset your password, click on "request password."

5**

Logging In



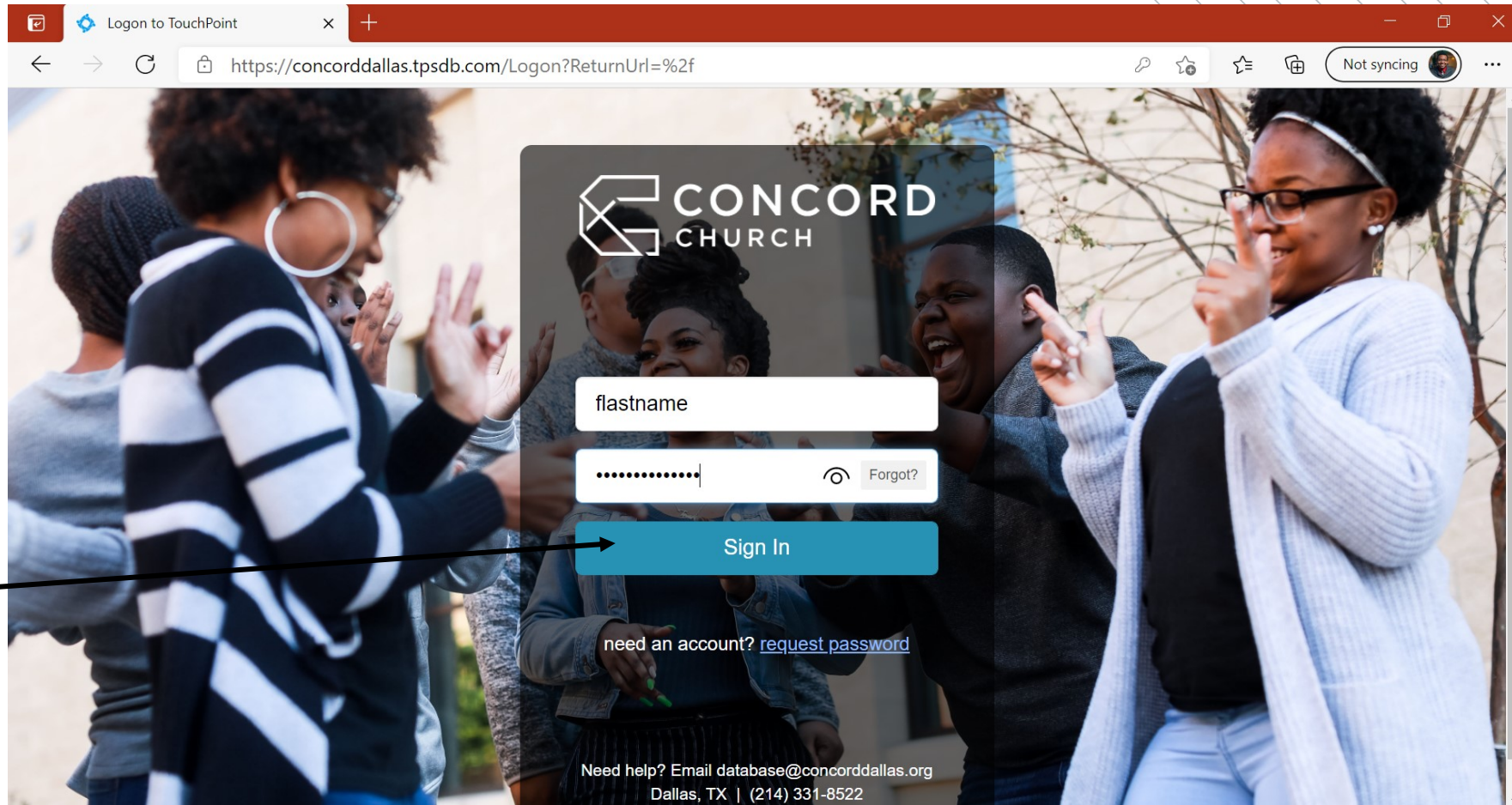
5**

Upon entering your username or email address, a password reset email will be sent to the email address we have on file for you.

5**

Note: If you do not have a profile within the system, you cannot reset your password with this method.

Logging In



6



6

When both fields are filled, click the “Sign In” button.

Logging In

The screenshot shows a web browser window with the URL <https://concorddallas.tpsdb.com/Person2/94939>. The page header features the Concord Church logo and a user profile for 'John'. The main content area displays the profile for J.B. Baptist, including a profile picture, contact information, and various tabs for navigation. The 'General' tab is active, showing a form with the following fields:

Title	First Name	Middle Name	Suffix	Last Name
Mr.	John	The		Baptist

Goes By	Alt Name	Former Name	Gender
J.B.			Male

Marital Status	Birthdate	Wedding Date	Deceased Date
Married	2/2/1995		

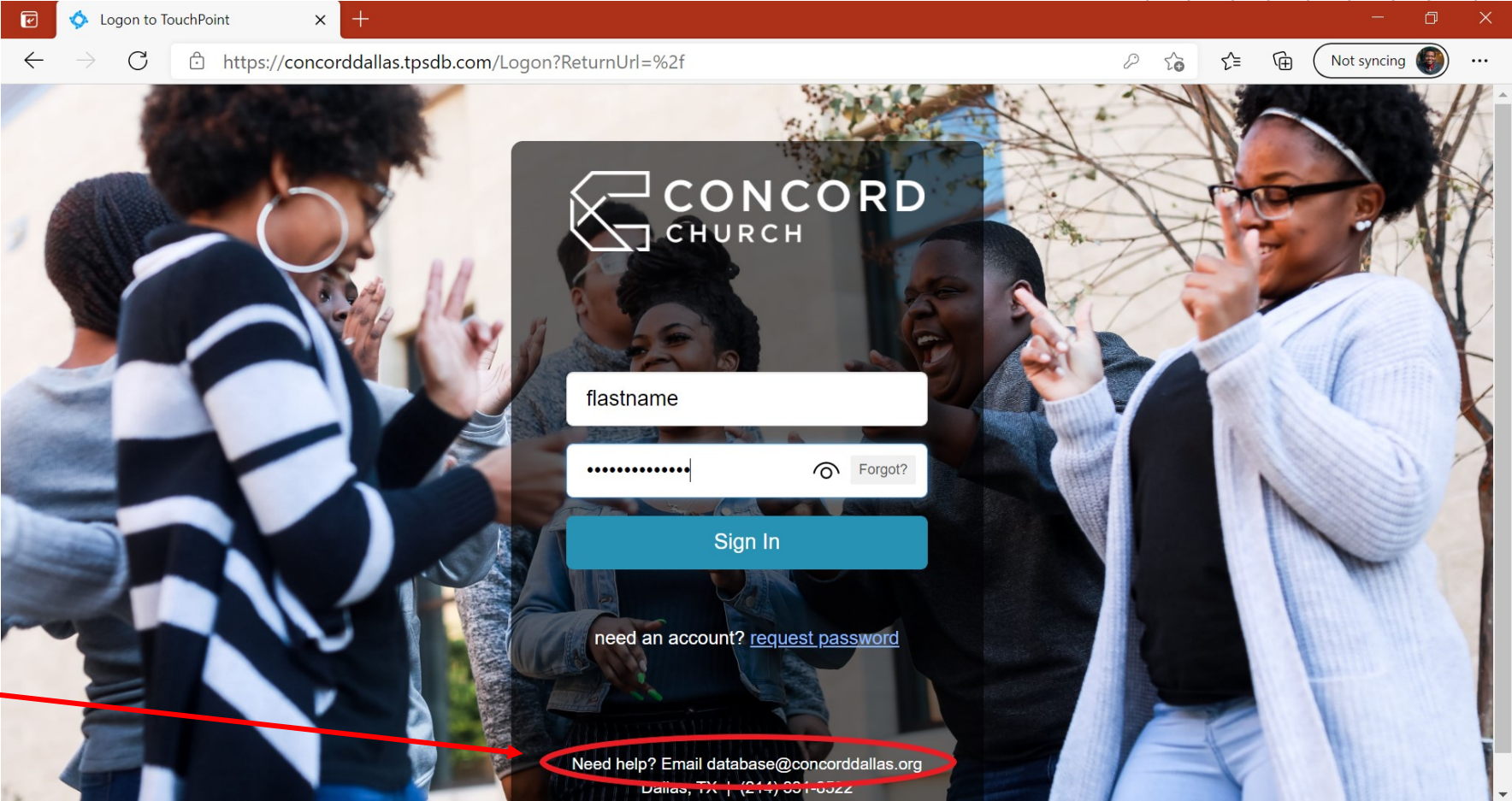
Below the 'General' section, there is a 'Communication' section with fields for 'Primary Email' and 'Alt Email'. On the left sidebar, there are sections for 'Family Members' (listing J.B. Baptist as Head), 'Related Families', and 'Family Photo'.



7

You will be Logged In and taken to your profile page.

Logging In



8



8

Lastly, if you need assistance with your Username or Password, remember you can email database@concorddallas.org.



TouchPoint Software
User Experience Storyboard:
Basics – Managing your Profile

Basics

The screenshot shows the Concord Church member profile for John Baptist. The page features the church logo, a user profile picture, and a navigation menu with tabs for Personal, Involvement, Profile, Ministry, Giving, and Communications. The 'Personal' tab is active, displaying a 'General' section with fields for Title, First Name (John), Middle Name, Suffix, Last Name (Baptist), Goes By, Alt Name, Former Name, Gender (Male), Marital Status (Married), Birthday (2/2/1995), Wedding Date, and Deceased Date. Below this is a 'Communication' section with fields for Primary Email (database@concorddallas.org) and Alt Email. A sidebar on the left lists 'Family Members', 'Related Families', and 'Family Photo'. The top right corner shows the user's name 'John' and a dropdown menu with icons for email, social media, and settings.



1

Once you have logged in, you will be shown your profile screen. It will resemble the above.

Basics

CONCORD CHURCH

John Baptist

6808 Pastor Bailey Dr, Dallas, TX 75237-2602
database@concorddallas.org • W (213) 123-1234

Primary Adult No Campus Member NMT-S1 Is Leader Completed TP Training

Personal Involvement Profile Ministry Giving Communications

General Edit

Title	First Name	Middle Name	Suffix	Last Name
	John			Baptist
Goes By	Alt Name	Former Name	Gender	
			Male	
Marital Status	Birthday	Wedding Date	Deceased Date	
Married	2/2/1995			

Communication

Primary Email	Alt Email

<https://concorddallas.tpsdb.com/Person2/PersonalEdit/94939> concorddallas.org



2

If anything on this screen is incorrect and you need to change it, click the “Edit” button.

Basics

CONCORD CHURCH

John Baptist

6808 Pastor Bailey Dr, Dallas, TX 75237-2602
database@concorddallas.org • W (213) 123-1234

Primary Adult No Campus Member NMT-S1 Is Leader Completed TP Training

Personal Involvement Profile Ministry Giving Communications

General Cancel Save Changes

Title	First Name	Middle Name	Last Name	Suffix
	John		Baptist	

Goes By	Alt Name	Former Name	Gender
			Male

Marital Status	Birthday	Wedding Date	Deceased Date
Married	2/2/1995		

Communication

Primary Email Alt Email

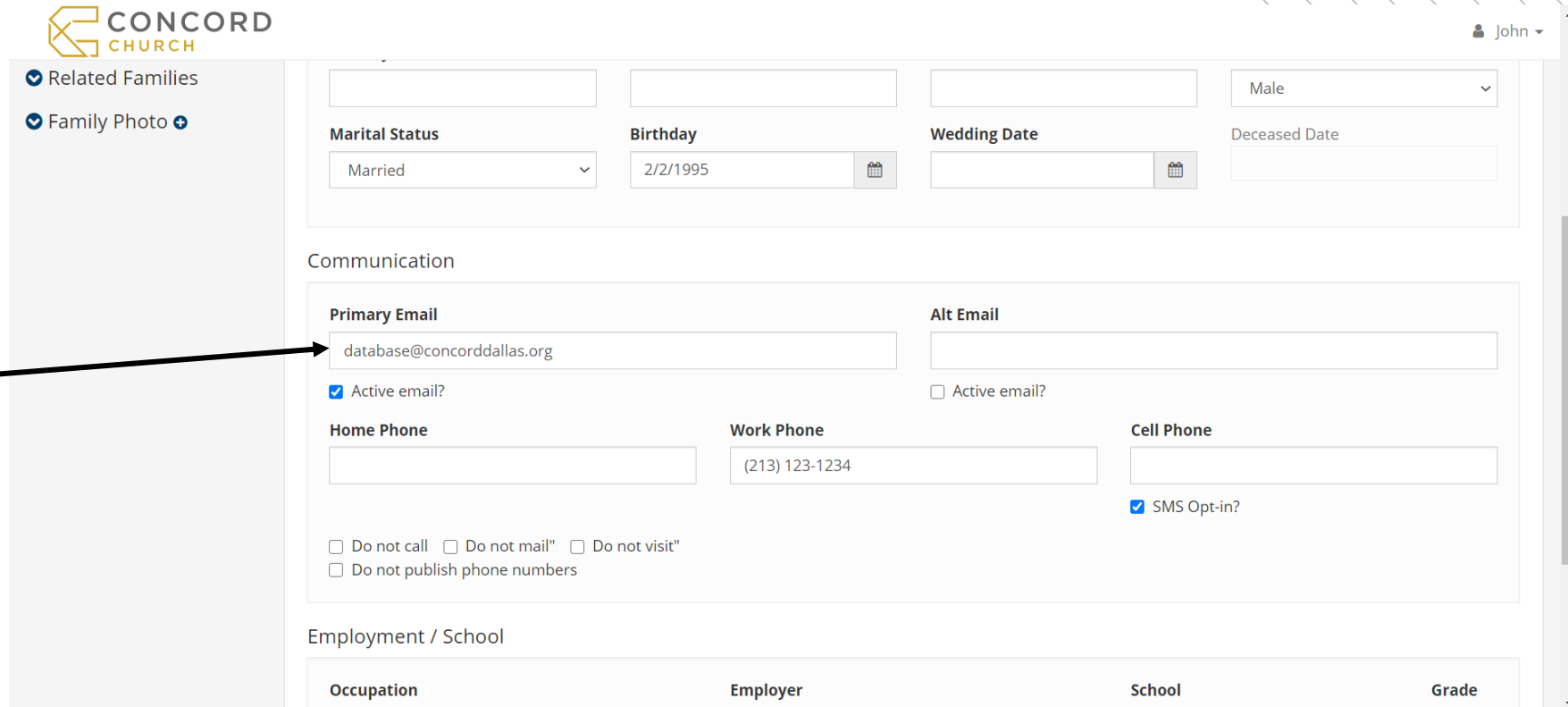


3

The information on screen will pop out and allow you to edit it.

Click on each area and Type in the changes you would like to make.

Basics



CONCORD CHURCH John ▾

Related Families
Family Photo +

Marital Status Married ▾ **Birthday** 2/2/1995 **Wedding Date** **Deceased Date** Male ▾

Communication

Primary Email database@concorddallas.org **Alt Email**
 Active email? Active email?

Home Phone **Work Phone** (213) 123-1234 **Cell Phone**
 Do not call Do not mail" Do not visit" SMS Opt-in?
 Do not publish phone numbers

Employment / School

Occupation	Employer	School	Grade
------------	----------	--------	-------

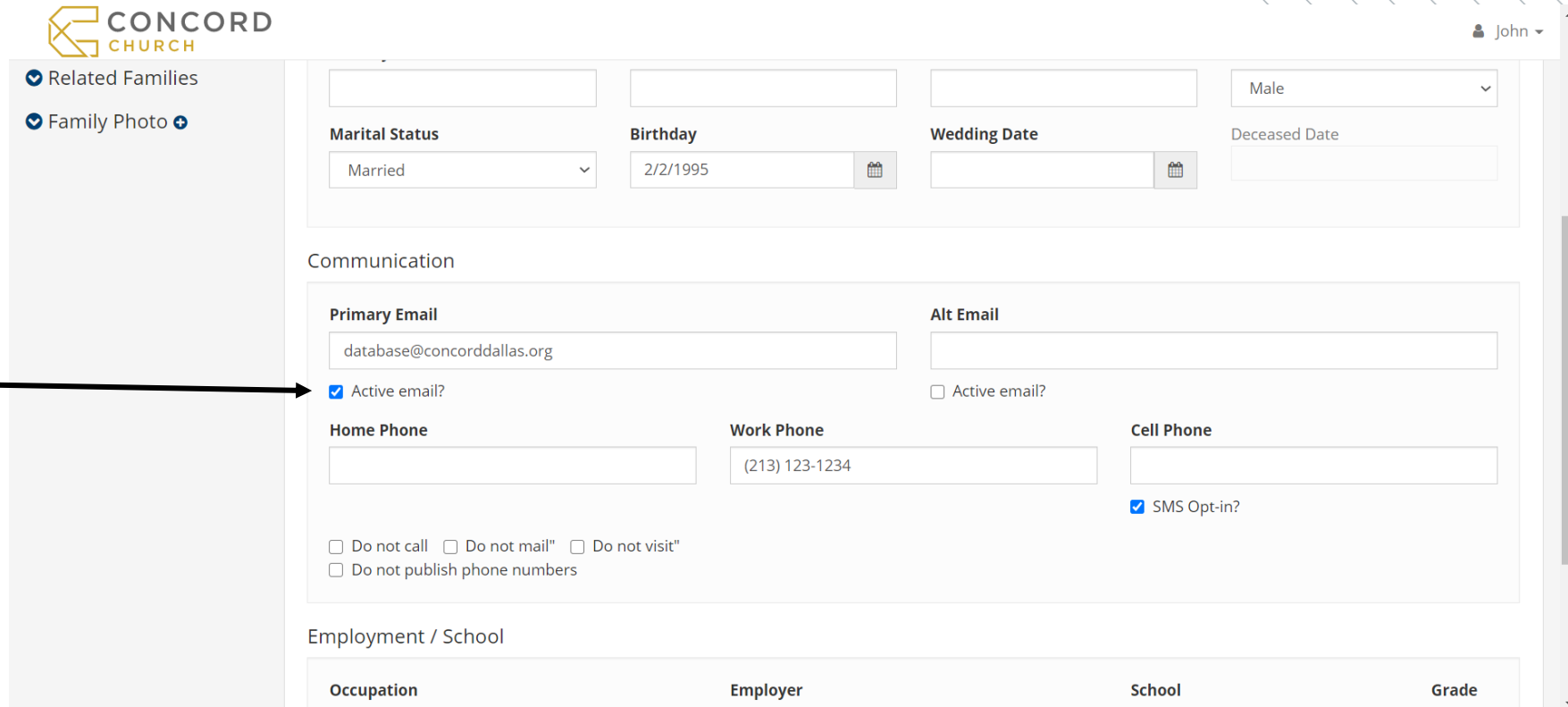
4



4

Be sure to Type in your Email Address if you want to receive emails from Concord.

Basics



CONCORD CHURCH

John

Related Families
Family Photo

Marital Status: Married
Birthday: 2/2/1995
Wedding Date:
Deceased Date:
Gender: Male

Communication

Primary Email
database@concorddallas.org
 Active email?

Alt Email

 Active email?

Home Phone

Work Phone
(213) 123-1234
Cell Phone

 SMS Opt-in?

Do not call Do not mail" Do not visit"
 Do not publish phone numbers

Employment / School

Occupation	Employer	School	Grade
------------	----------	--------	-------

5



5

Also ensure that you check “Active Email” to allow us to send you emails. (If you don’t want an email to be used, un-check “Active Email.”)

Basics

CONCORD CHURCH

John

Related Families
Family Photo

Marital Status: Married
Birthday: 2/2/1995
Wedding Date:
Deceased Date:
Male

Communication

Primary Email: database@concorddallas.org
Alt Email:
 Active email? Active email?

Home Phone:
Work Phone: (213) 123-1234
Cell Phone:
 SMS Opt-in?

Do not call Do not mail" Do not visit"
 Do not publish phone numbers

Employment / School

Occupation	Employer	School	Grade
------------	----------	--------	-------

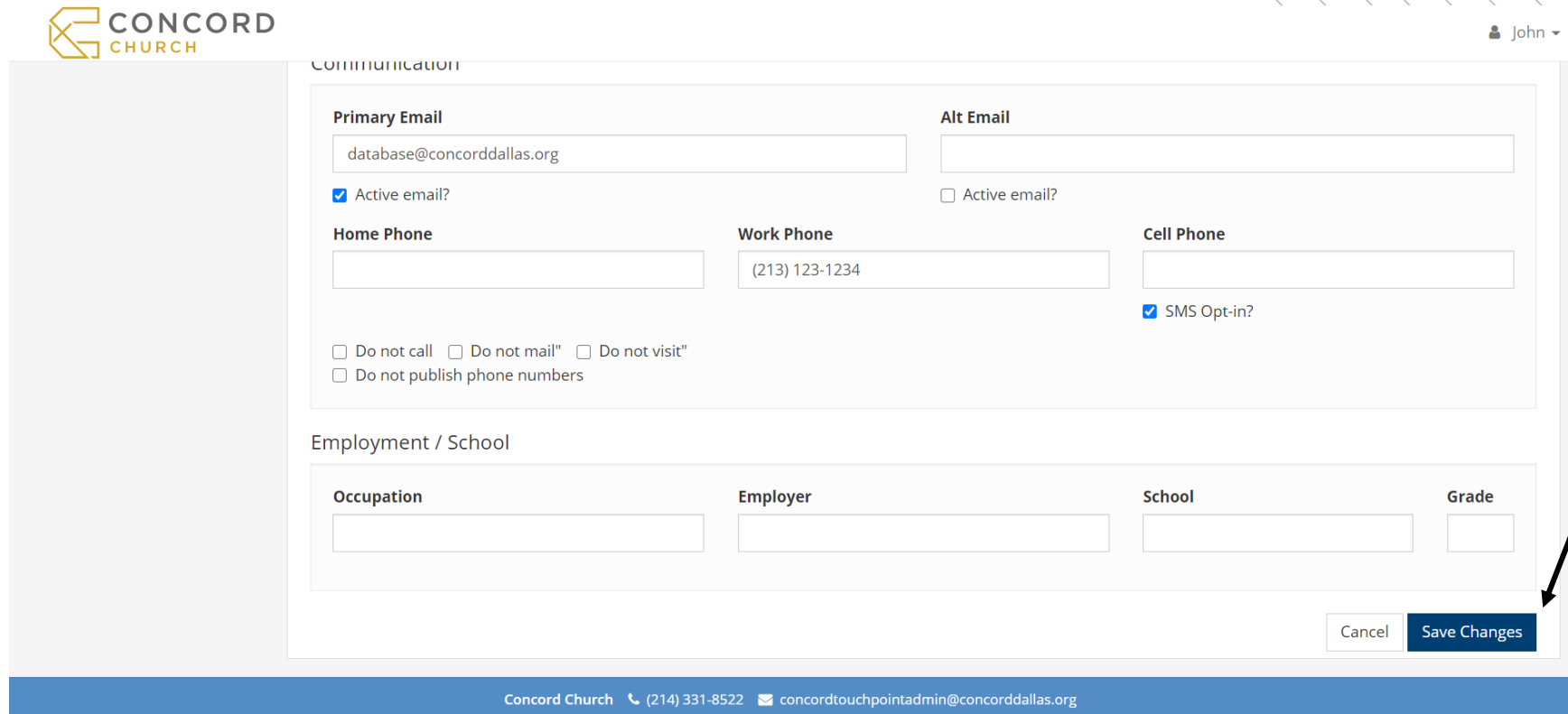
6



6

Similarly, be sure to check “SMS Opt-in” to allow Concord to send you texts to your cell phone number.

Basics



The screenshot shows a web interface for Concord Church. At the top left is the logo and name "CONCORD CHURCH". At the top right is a user profile icon labeled "John". The main content area is divided into two sections: "Communication" and "Employment / School".

Communication Section:

- Primary Email:** A text input field containing "database@concorddallas.org".
- Alt Email:** An empty text input field.
- Active email?:** A checked checkbox.
- Home Phone:** An empty text input field.
- Work Phone:** A text input field containing "(213) 123-1234".
- Cell Phone:** An empty text input field.
- SMS Opt-in?:** A checked checkbox.
- Privacy options:** Four unchecked checkboxes: "Do not call", "Do not mail", "Do not visit", and "Do not publish phone numbers".

Employment / School Section:

- Occupation:** An empty text input field.
- Employer:** An empty text input field.
- School:** An empty text input field.
- Grade:** An empty text input field.

At the bottom right of the form are two buttons: "Cancel" and "Save Changes". A blue footer bar at the very bottom contains contact information: "Concord Church", a phone icon with "(214) 331-8522", and an email icon with "concordtouchpointadmin@concorddallas.org".

7




7

When you are finished adding your changes, scroll to the bottom of the screen and click "Save Changes."

Basics

CONCORD CHURCH


John Baptist

6808 Pastor Bailey Dr, Dallas, TX 75237-2602 

database@concorddallas.org • W (213) 123-1234

Primary Adult No Campus Member NMT-S1 Is Leader Completed TP Training

Personal Involvement Profile Ministry Giving Communications

General 

Title	First Name	Middle Name	Suffix	Last Name
	John			Baptist
Goes By	Alt Name	Former Name	Gender	
			Male	
Marital Status	Birthday	Wedding Date	Deceased Date	
Married	2/2/1995			

Communication

Primary Email	Alt Email
https://concorddallas.tpsdb.com/Person2/PictureDialog/94939@concorddallas.org	

8



8

If you need to change your Address, click on the “Pencil” icon under you name.

Basics

CONCORD CHURCH

John Baptist
26 • Member • Head
database@concorddallas.org

Family Members
Related Families
Family Photo

Edit Address

Family Address | Edit Personal Address

Address Line 1: 6808 Pastor Bailey Dr

Address Line 2:

City Name: Dallas | State Code: TX - Texas | Zip Code: 75237-2602

Country: United States | From Date: | To Date:

Resident Code: Non-Resident | Primary Address: True | Bad Address Flag

Cancel | Clear | Submit

Communication

Primary Email: database@concorddallas.org | Alt Email:

9



9

Enter in the details of your address.

Basics

CONCORD CHURCH

John

Edit Address

Family Address | Edit Personal Address

Address Line 1: 6808 Pastor Bailey Dr

Address Line 2:

City Name: Dallas | State Code: TX - Texas | Zip Code: 75237-2602

Country: United States | From Date: | To Date:

Resident Code: Non-Resident | Primary Address: True | Bad Address Flag

Cancel | Clear | Submit



10

Once finished, click "Submit."

10

Basics

CONCORD CHURCH

John Baptist

6808 Pastor Bailey Dr, Dallas, TX 75237-2602
database@concorddallas.org • W (213) 123-1234

Primary Adult No Campus Member NMT-S1 Is Leader | Completed TP Training |

Personal Involvement Profile Ministry Giving Communications

General Edit

Title	First Name	Middle Name	Suffix	Last Name
	John			Baptist
Goes By	Alt Name		Former Name	Gender
				Male
Marital Status	Married	Birthday	2/2/1995	Wedding Date
				Deceased Date

Communication

Primary Email	Alt Email

<https://concorddallas.tpsdb.com/Person2/PictureDialog/94939> concorddallas.org

John

Family Members

- John Baptist
26 • Member • Head
database@concordd...

Related Families

Family Photo

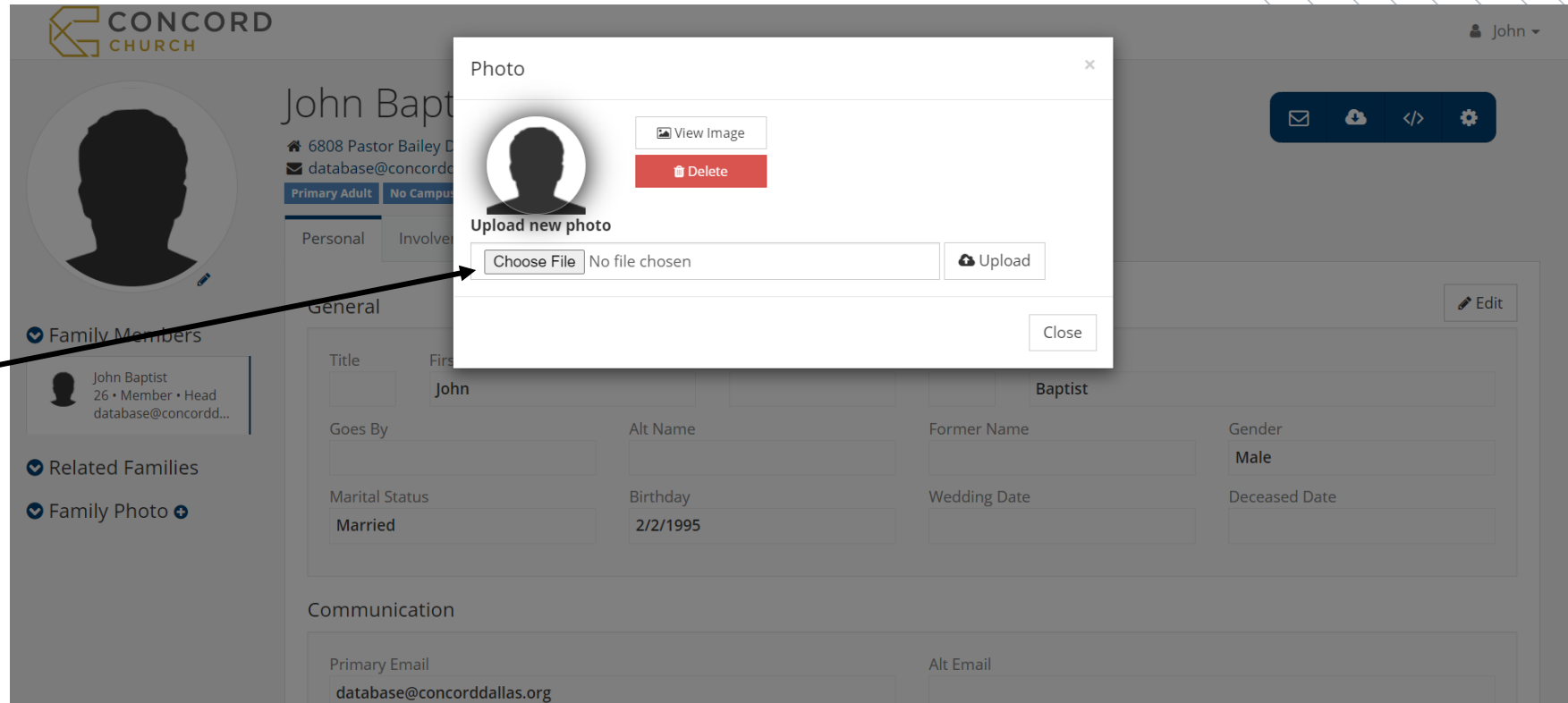
11



11

To add a photo, click on the “Pencil” next to the person icon.

Basics



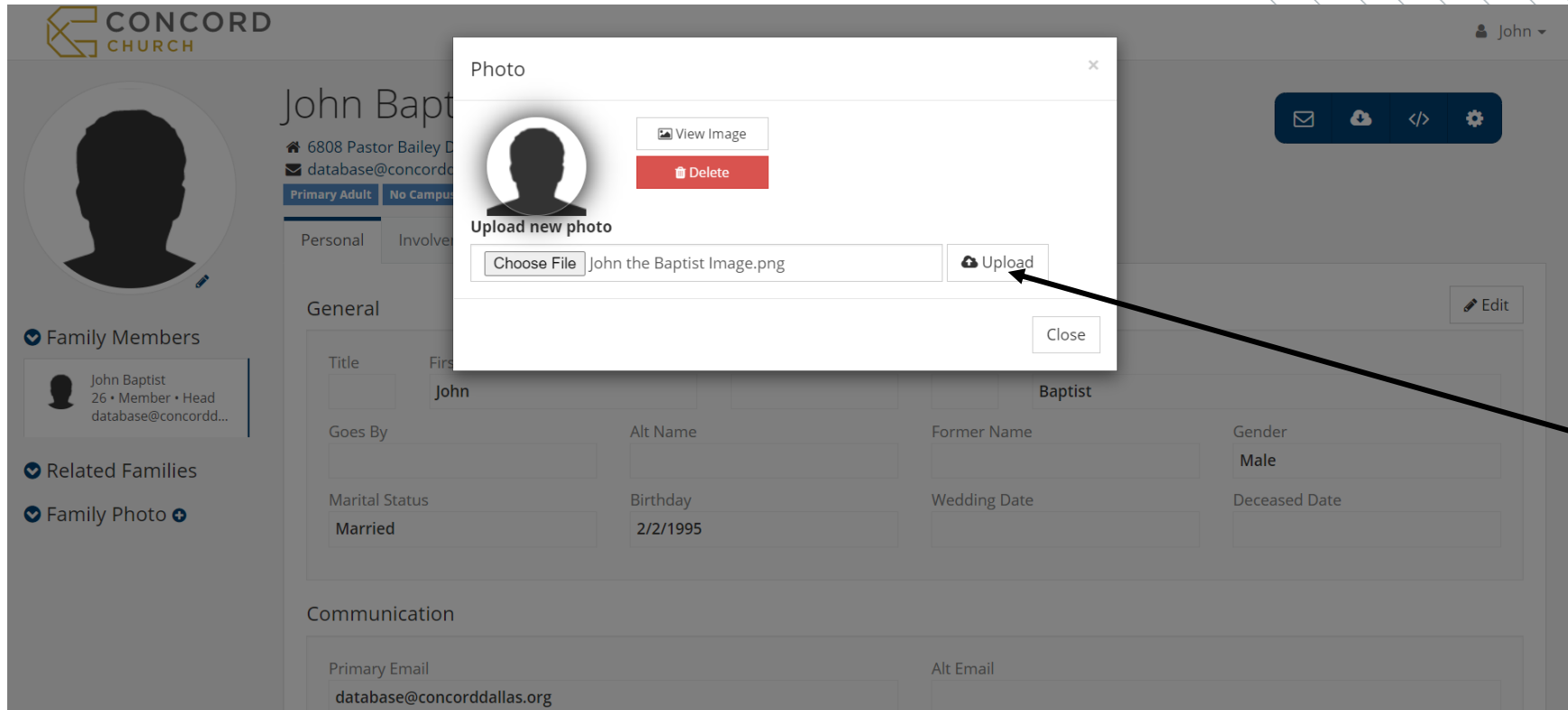
12



12

Click "Choose File" to search your computer for your photo.

Basics



13

Once you have selected your photo, click “Upload” to save your photo to TouchPoint.

Basics

CONCORD CHURCH

John Baptist

6808 Pastor Bailey Dr, Dallas, TX 75237-2602
database@concorddallas.org • W (213) 123-1234

Primary Adult No Campus Member NMT-S1 Is Leader Completed TP Training

Personal Involvement Profile Ministry Giving Communications

General

Title First Name Middle Name Suffix Last Name
John Baptist

Goes By Alt Name Former Name Gender
Male

Marital Status Birthday Wedding Date Deceased Date
Married 2/2/1995

Communication

Primary Email Alt Email
database@concorddallas.org

Family Members

John Baptist
26 • Member • Head
database@concordd...

Related Families

Family Photo +

14

14

If you want, you can upload a family photo too.



Basics

15

CONCORD CHURCH

John Baptist

6808 Pastor Bailey Dr, Dallas, TX 75237-2602
database@concorddallas.org • W (213) 123-1234

Primary Audit No Campus Member NMT-S1 Is Leader | Completed TP Training |

Personal Involvement Profile Ministry Giving Communications

General Edit

Title	First Name	Middle Name	Suffix	Last Name
	John			Baptist
Goes By	Alt Name	Former Name	Gender	
			Male	
Marital Status	Birthday	Wedding Date	Deceased Date	
Married	2/2/1995			

Communication

Primary Email	Alt Email
database@concorddallas.org	

<https://concorddallas.tpsdb.com/Person2/94939#>

John

- Profile
- Change Password
- Open Person In New Tab
- Open Involvement In New Tab
- Log Out



15

For login options, click on your "name" at the top right.

Basics

CONCORD CHURCH

John Baptist

6808 Pastor Bailey Dr, Dallas, TX 75237-2602
database@concorddallas.org • W (213) 123-1234

Primary Adult No Campus Member NMT-S1 Is Leader Completed TP Training

Personal Involvement Profile Ministry Giving Communications

General Edit

Title	First Name	Middle Name	Suffix	Last Name
	John			Baptist
Goes By	Alt Name	Former Name	Gender	
			Male	
Marital Status	Birthday	Wedding Date	Deceased Date	
Married	2/2/1995			

Communication

Primary Email	Alt Email

https://concorddallas.tpsdb.com/Account/ChangePassword/ concorddallas.org

John

- Profile
- Change Password
- Open Person In New Tab
- Open Involvement In New Tab
- Log Out

16



16

To change your password, click “Change Password.”

Basics

CONCORD CHURCH

John Baptist

6808 Pastor Bailey Dr, Dallas, TX 75237-2602
database@concorddallas.org • W (213) 123-1234

Primary Adult No Campus Member NMT-S1 Is Leader Completed TP Training

Personal Involvement Profile Ministry Giving Communications

General Edit

Title	First Name	Middle Name	Suffix	Last Name
	John			Baptist
Goes By	Alt Name	Former Name	Gender	
			Male	
Marital Status	Birthday	Wedding Date	Deceased Date	
Married	2/2/1995			

Communication

Primary Email	Alt Email
database@concorddallas.org	

John

- Profile
- Change Password
- Open Person In New Tab
- Open Involvement In New Tab
- Log Out

17



17

To log out, click “Log Out.”

Basics

CONCORD CHURCH

John Baptist

6808 Pastor Bailey Dr, Dallas, TX 75237-2602
database@concorddallas.org • W (213) 123-1234

Primary Adult No Campus Member NMT-S1 Is Leader Completed TP Training

Personal Involvement Profile Ministry Giving Communications

General Edit

Title	First Name	Middle Name	Suffix	Last Name
	John			Baptist
Goes By	Alt Name	Former Name	Gender	
			Male	
Marital Status	Birthday	Wedding Date	Deceased Date	
Married	2/2/1995			

Communication

Primary Email	Alt Email
database@concorddallas.org	

18



18

Now that you know the basics, feel free to explore the other tabs.

Many things can only be changed by Concord Staff.

So if you have any questions, please reach out to database@concorddallas.org.



TouchPoint Software
User Experience Storyboard:
Viewing Your Group Members

Viewing Your Group Members

CONCORD CHURCH John

John Baptist

6808 Pastor Bailey Dr, Dallas, TX 75237-2602
database@concorddallas.org • W (214) 123-2134

Primary Adult No Campus Member Is Leader ||Completed TP Training||

Personal **Involvement** Profile Ministry Giving Communications

General Privacy Settings Edit

Title	First Name	Middle Name	Suffix	Last Name
Mr.	John			Baptist
Goes By	Alt Name	Former Name	Gender	
			Male	
Marital Status	Birthday	Wedding Date	Deceased Date	
Married	2/2/1995			

Communication

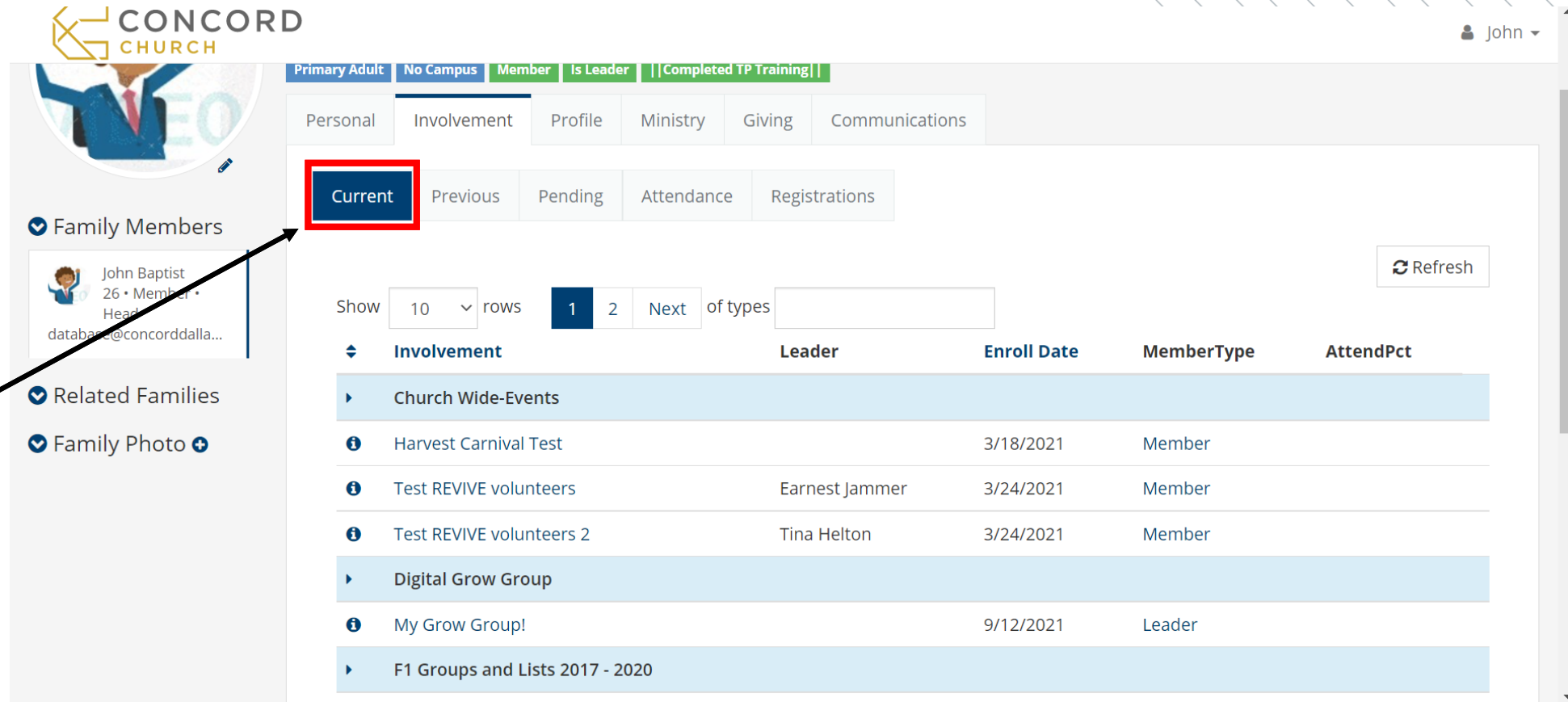
1



1

Upon logging in, *click* on the Involvement Tab.
If you need help logging in, please see “Step 1 – Logging In.”

Viewing Your Group Members



The screenshot shows the Concord Church member profile page. The 'Current' tab is highlighted in blue. The page displays a list of group members with columns for Involvement, Leader, Enroll Date, MemberType, and AttendPct. A red box highlights the 'Current' tab, and a circled '2' with an arrow points to it.

CONCORD CHURCH John

Primary Adult No Campus **Member** Is Leader Completed TP Training

Personal Involvement Profile Ministry Giving Communications

Current Previous Pending Attendance Registrations

Refresh

Show 10 rows 1 2 Next of types

Involvement	Leader	Enroll Date	MemberType	AttendPct
Church Wide-Events				
Harvest Carnival Test		3/18/2021	Member	
Test REVIVE volunteers	Earnest Jammer	3/24/2021	Member	
Test REVIVE volunteers 2	Tina Helton	3/24/2021	Member	
Digital Grow Group				
My Grow Group!		9/12/2021	Leader	
F1 Groups and Lists 2017 - 2020				

2

2

Once you are on the Involvement Page, ensure that the “Current” tab is highlighted Blue. If it is not, *click* it.



Viewing Your Group Members

The screenshot shows the Concord Church member profile for John Baptist. The page is titled "CONCORD CHURCH" and includes a user profile section on the left with a photo and contact information. The main content area displays a list of "Current" involvements. A red box highlights the "My Grow Group!" entry, which is a leader role. A circled number "3" with an arrow points to this entry.

Involvement	Leader	Enroll Date	MemberType	AttendPct
Church Wide-Events				
Harvest Carnival Test		3/18/2021	Member	
Test REVIVE volunteers	Earnest Jammer	3/24/2021	Member	
Test REVIVE volunteers 2	Tina Helton	3/24/2021	Member	
Digital Grow Group				
My Grow Group!		9/12/2021	Leader	
F1 Groups and Lists 2017 - 2020				

3



3

Now that you are viewing your current involvements, look for the name of your Grow Group.

Viewing Your Group Members

The screenshot shows the Concord Church member profile page. The user is logged in as John. The page displays filters for 'Primary Adult', 'No Campus', 'Member', 'Is Leader', and 'Completed TP Training'. The 'Involvement' tab is selected, showing a list of groups. The 'Current' sub-tab is active. The table below shows the following data:

Involvement	Leader	Enroll Date	MemberType	AttendPct
Church Wide-Events				
Harvest Carnival Test		3/18/2021	Member	
Test REVIVE volunteers	Earnest Jammer	3/24/2021	Member	
Test REVIVE volunteers 2	Tina Helton	3/24/2021	Member	
Digital Grow Group				
My Grow Group!		9/12/2021	Leader	
F1 Groups and Lists 2017 - 2020				

A red box highlights the word 'Leader' in the 'MemberType' column for 'My Grow Group!'. An arrow points from a circled '4' on the right to this box.



4

Make sure that you see the word, “Leader” to the right of your Grow Group name. If you do not, please contact us at support@concorddallas.org.

Viewing Your Group Members

The screenshot shows the Concord Church member profile page. The user is John Baptist, a 26-year-old member and head, with email database@concorddalla... The page displays various tabs for profile management: Personal, Involvement, Profile, Ministry, Giving, and Communications. Under the Involvement tab, there are sub-tabs for Current, Previous, Pending, Attendance, and Registrations. A table lists group memberships with columns for Involvement, Leader, Enroll Date, MemberType, and AttendPct. The 'My Grow Group!' entry is highlighted with a red box and a circled '5' with an arrow pointing to it. Other groups include Church Wide-Events, Harvest Carnival Test, Test REVIVE volunteers, Test REVIVE volunteers 2, Digital Grow Group, and F1 Groups and Lists 2017 - 2020.

Involvement	Leader	Enroll Date	MemberType	AttendPct
Church Wide-Events				
Harvest Carnival Test		3/18/2021	Member	
Test REVIVE volunteers	Earnest Jammer	3/24/2021	Member	
Test REVIVE volunteers 2	Tina Helton	3/24/2021	Member	
Digital Grow Group				
My Grow Group!		9/12/2021	Leader	
F1 Groups and Lists 2017 - 2020				

5



5

If you see the word Leader, then that means you are an owner of that Grow Group. *Click* on your Group Name to view your group.

Viewing Your Group Members

CONCORD CHURCH

John

My Grow Group!

Digital Grow Group Main Campus Active Monday, 8:00 AM, Every Meeting

People Meetings Settings Registration CG Info

4 Members Previous Inactive Pending Prospects Guests Options

Add Members Filter Person Show 10 rows

<input type="checkbox"/>	Name	MemberType	Church	Communication	% Att.	Dates	Actions
<input type="checkbox"/>	John Baptist	Leader	Member	W (214) 123-2134 database@concorddallas.org		Joined 9/12/21 0	
<input type="checkbox"/>	Jill Doed	Member	Just Added	C (214) 945-1199 database@concorddallas.org		Joined 9/13/21	
<input type="checkbox"/>	Earnest Jammer	Member	Member	C (214) 850-5228 H (214) 850-5228 ejammer@concorddallas.org		Joined 9/13/21	
<input type="checkbox"/>	Esther Mord	Leader	Iust Added	database@concorddallas.org		loined 9/12/21 0	

6



6

Once the page loads, it should load to the “People Tab.”
If it does not, *click* on the tab to load the correct page.
Here, you will be able to view all of the individuals currently registered for your group.



TouchPoint Software
User Experience Storyboard:
Adding Members to your Group

Adding Members to Your Group

CONCORD CHURCH

My Grow Group!

Digital Grow Group Main Campus Active Monday, 8:00 AM, Every Meeting

People Meetings Settings Registration CG Info

4 Members Previous Inactive Pending Prospects Guests Options

Add Members Filter Person

Show 10 rows

<input type="checkbox"/>	Name	MemberType	Church	Communication	% Att.	Dates	Actions
<input type="checkbox"/>	John Baptist	Leader	Member	W (214) 123-2134 database@concorddallas.org		Joined 9/12/21 0	
<input type="checkbox"/>	Jill Doed	Member	Just Added	C (214) 945-1199 database@concorddallas.org		Joined 9/13/21	
<input type="checkbox"/>	Earnest Jammer	Member	Member	ejammer@concorddallas.org		Joined 9/13/21	

<https://concorddallas.tpsdb.com/SearchAdd2/Dialog/org/3421> Just Added database@concorddallas.org Joined 9/12/21 0



1

Once you are within your group and viewing your Group Members on the “People Tab,” click the “Add Members” button.
(For steps on how to view your group members, please see “Step 3 – Viewing Your Group Members.”)

Adding Members to Your Group

CONCORD CHURCH

My Grow Group

Digital Grow Group Main

People Meetings

6 Members Pre

Add Members

Cancel

Advanced Search

Skip Search / Add New

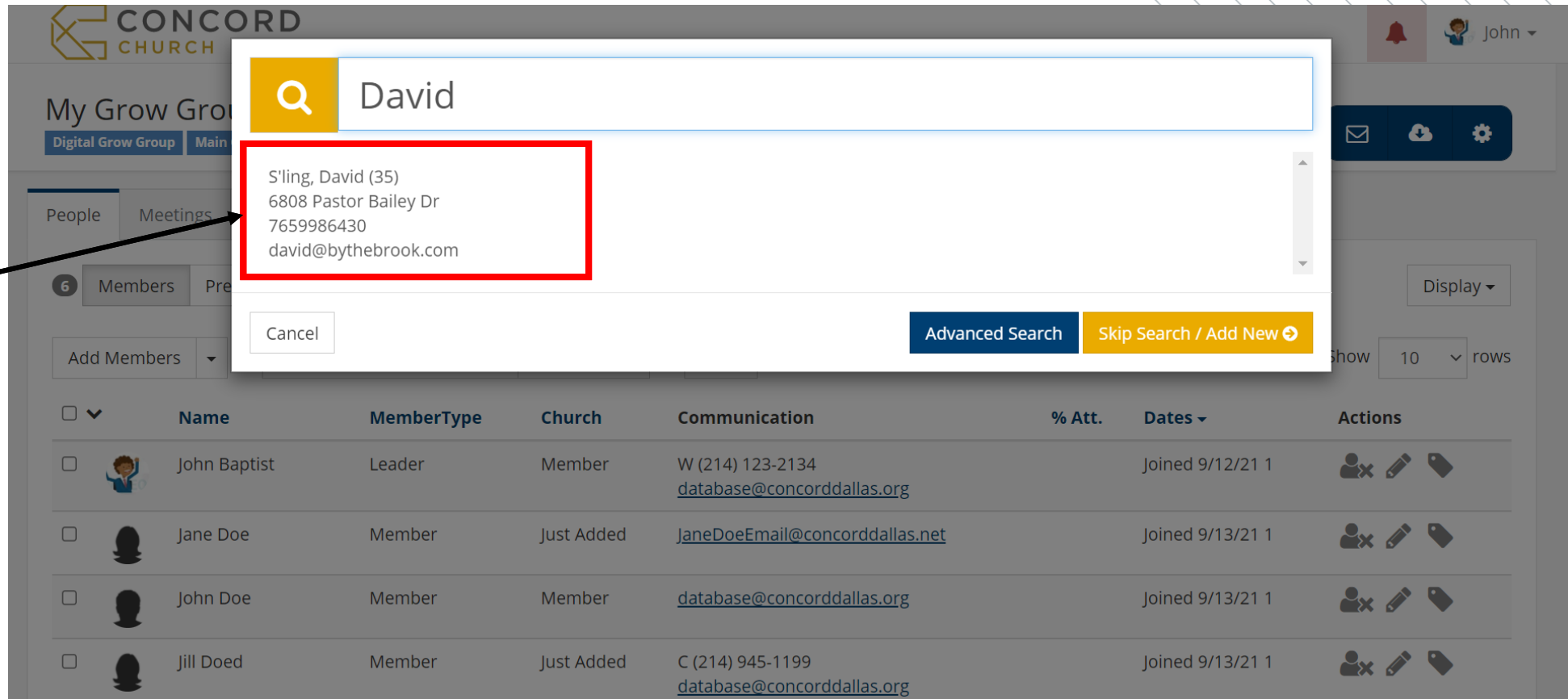
<input type="checkbox"/>	Name	MemberType	Church	Communication	% Att.	Dates	Actions
<input type="checkbox"/>	John Baptist	Leader	Member	W (214) 123-2134 database@concorddallas.org		Joined 9/12/21 1	
<input type="checkbox"/>	Jane Doe	Member	Just Added	JaneDoeEmail@concorddallas.net		Joined 9/13/21 1	
<input type="checkbox"/>	John Doe	Member	Member	database@concorddallas.org		Joined 9/13/21 1	
<input type="checkbox"/>	Jill Doed	Member	Just Added	C (214) 945-1199 database@concorddallas.org		Joined 9/13/21 1	



2

In the menu that appears, type in the name of the person that you want to add.

Adding Members to Your Group



The screenshot shows the Concord Church software interface. A search bar at the top contains the name 'David'. A dropdown menu is open, displaying search results for 'David'. The first result is highlighted with a red box and contains the following information:

- S'ling, David (35)
- 6808 Pastor Bailey Dr
- 7659986430
- david@bythebrook.com

Below the search bar, there are buttons for 'Cancel', 'Advanced Search', and 'Skip Search / Add New'. The main interface shows a table of members with columns for Name, MemberType, Church, Communication, % Att., Dates, and Actions. The table lists several members, including John Baptist, Jane Doe, John Doe, and Jill Doed.

3



3

If the person you are looking for appears in the drop down, click on them.

Adding Members to Your Group

Pending List to Add as Member of Organization

Name

David S'ling Remove

Cancel Another Search Commit and Add

<input type="checkbox"/>	Name	MemberType	Church	Communication	% Att.	Dates	Actions
<input type="checkbox"/>	John Baptist	Leader	Member	W (214) 123-2134 database@concorddallas.org		Joined 9/12/21 1	
<input type="checkbox"/>	Jane Doe	Member	Just Added	JaneDoeEmail@concorddallas.net		Joined 9/13/21 1	
<input type="checkbox"/>	John Doe	Member	Member	database@concorddallas.org		Joined 9/13/21 1	
<input type="checkbox"/>	Jill Doed	Member	Just Added	C (214) 945-1199 database@concorddallas.org		Joined 9/13/21 1	



4 Click on “Commit and Add.”

Adding Members to Your Group

<input type="checkbox"/>	Name	MemberType	Church	Communication	% Att.	Dates	Actions
<input type="checkbox"/>	John Baptist	Leader	Member	W (214) 123-2134 database@concorddallas.org		Joined 9/12/21 1	
<input type="checkbox"/>	Jane Doe	Member	Just Added	JaneDoeEmail@concorddallas.net		Joined 9/13/21 1	
<input type="checkbox"/>	John Doe	Member	Member	database@concorddallas.org		Joined 9/13/21 1	
<input type="checkbox"/>	Jill Doed	Member	Just Added	C (214) 945-1199 database@concorddallas.org		Joined 9/13/21 1	
<input type="checkbox"/>	Earnest Jammer	Member	Member	ejammer@concorddallas.org		Joined 9/13/21 1	
<input type="checkbox"/>	Esther Mord	Leader	Just Added	database@concorddallas.org		Joined 9/12/21 1	
<input type="checkbox"/>	David S'ling	Member	Just Added	C (765) 998-6430 david@bythebrook.com		Joined 9/14/21	

Showing 7 of 7 records

5



5

The person you wanted to add will appear in your group.

What if...?

What if the person I'm adding doesn't appear in the dropdown list?

Viewing Your Group Members

CONCORD CHURCH

My Grow Group

Digital Grow Group Main

John

Search: John Doe

Cancel Advanced Search Skip Search / Add New

Members Previous Inactive Pending Prospects Guests Options

Add Members name Filter Person Clear

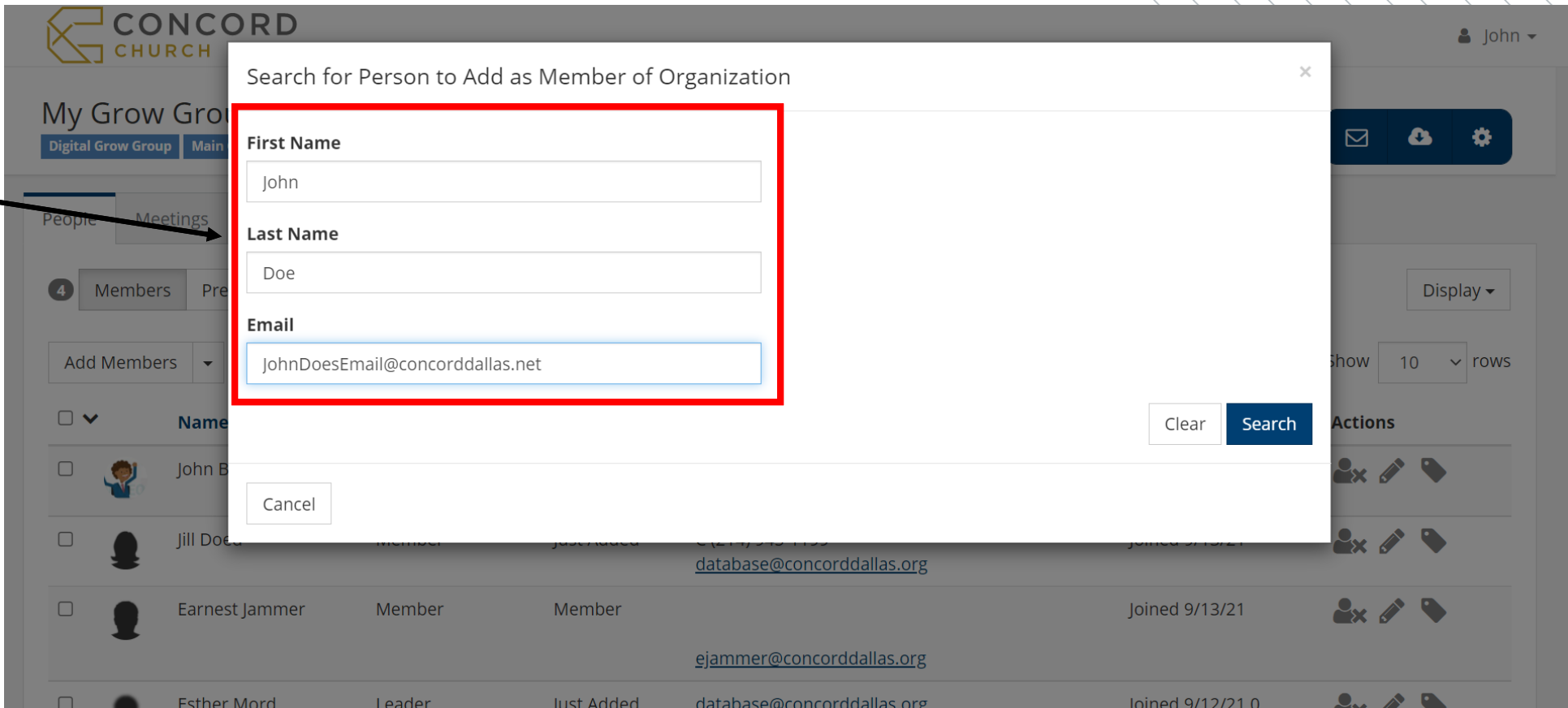
<input type="checkbox"/>	Name	MemberType	Church	Communication	% Att.	Dates	Actions
<input type="checkbox"/>	John Baptist	Leader	Member	W (214) 123-2134 database@concorddallas.org		Joined 9/12/21 0	
<input type="checkbox"/>	Jill Doed	Member	Just Added	C (214) 945-1199 database@concorddallas.org		Joined 9/13/21	
<input type="checkbox"/>	Earnest Jammer	Member	Member	ejammer@concorddallas.org		Joined 9/13/21	
<input type="checkbox"/>	Esther Mord	Leader	Just Added	database@concorddallas.org		Joined 9/12/21 0	



6

If you type in someone's name, and the dropdown list does NOT appear. Click on "Advanced Search" to search for them further.

Viewing Your Group Members



7

CONCORD CHURCH

My Grow Group

Digital Grow Group Main

Search for Person to Add as Member of Organization

First Name
John

Last Name
Doe

Email
JohnDoesEmail@concorddallas.net

Cancel Clear Search

Name	Role	Joined	Email
John B	Member		database@concorddallas.org
Jill Doe	Member		database@concorddallas.org
Earnest Jammer	Member	Joined 9/13/21	ejammer@concorddallas.org
Esther Mord	Leader	Just Added	database@concorddallas.org

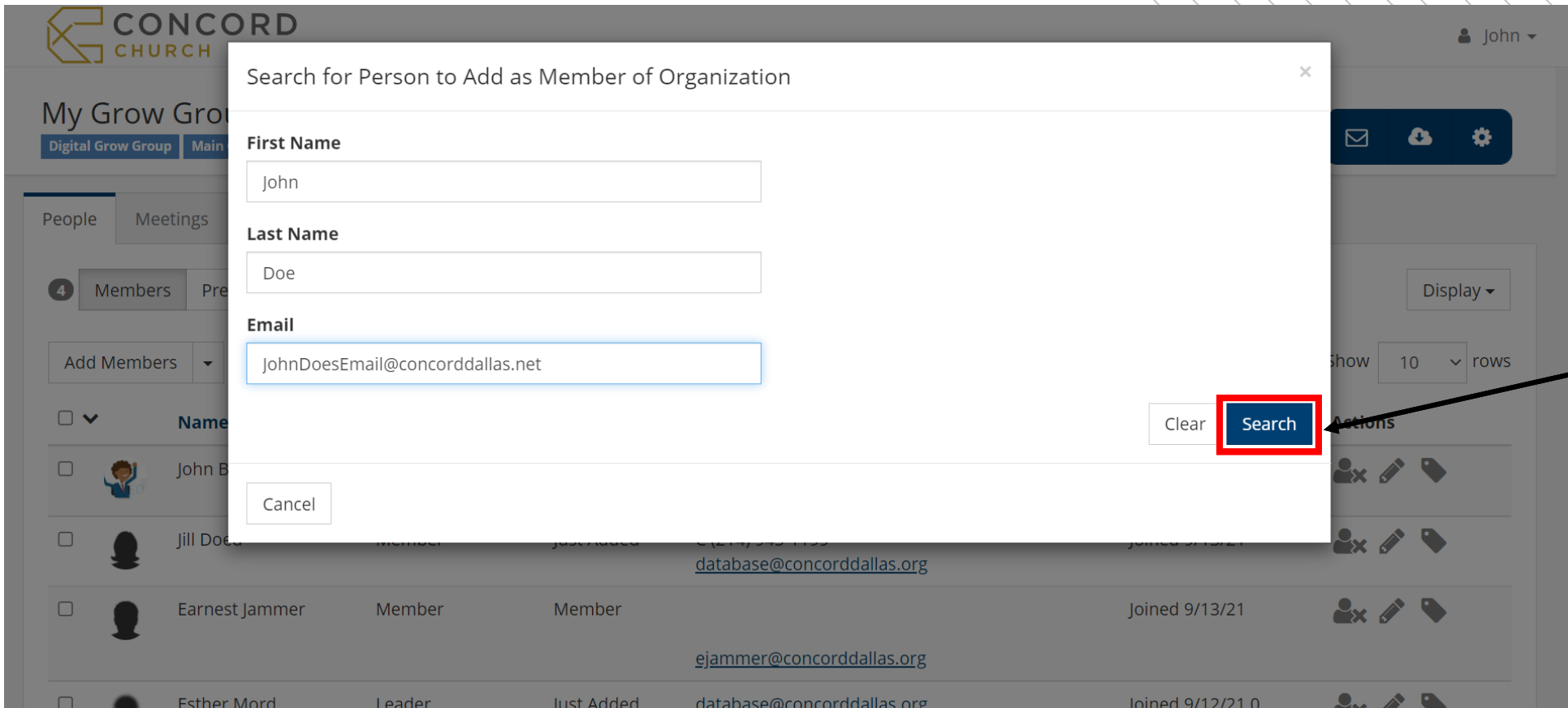
On the advanced search page, type in the person's information into the appropriate boxes.

7

Important: The email address is very important when searching. Ensure that you use a person's correct email when searching.



Viewing Your Group Members



The screenshot shows the Concord Church website interface. A modal window titled "Search for Person to Add as Member of Organization" is open. The modal contains three input fields: "First Name" with the text "John", "Last Name" with the text "Doe", and "Email" with the text "JohnDoesEmail@concorddallas.net". Below the input fields are two buttons: "Clear" and "Search". The "Search" button is highlighted with a red border. In the background, a table of members is visible, with the "Search" button in the modal also highlighted by a red box and a black arrow pointing to it from a circled number 8.

Name	Role	Joined
John B	Member	
Jill Doe	Member	
Earnest Jammer	Member	Joined 9/13/21
Esther Mord	Leader	Just Added



8

When done, click search.

Viewing Your Group Members

The screenshot shows the Concord Church database interface. A search window titled "Individual Search Results" is open, displaying a search result for "John Doe". The name "John Doe" is highlighted in blue and enclosed in a red box. Below the search results, there are three buttons: "Refine your Search", "Create New Person", and "Add This Person to Org". The "Add This Person to Org" button is also highlighted with a red box. A circled number "9" is positioned to the left of the search window, with two arrows pointing to the "John Doe" name and the "Add This Person to Org" button. The background shows a list of members with columns for Name, Role, Status, Contact Info, and Date Added.

Name	Role	Status	Contact Info	Date Added
John Baptist	Leader	Member	W (214) 123-2134 database@concorddallas.org	Joined 9/12/21 0
Jill Doed	Member	Just Added	C (214) 945-1199 database@concorddallas.org	Joined 9/13/21
Earnest Jammer	Member	Member	ejammer@concorddallas.org	Joined 9/13/21
Esther Mord	Leader	Just Added	database@concorddallas.org	Joined 9/12/21 0



9

If the individual you are searching for is within our database, their name will appear in blue. Click on their "name" OR "Add This Person to Org" to add them to your group.

Viewing Your Group Members



John

My Grow Group!

Digital Grow Group Main Campus Active Monday, 8:00 AM, Every Meeting



People Meetings Settings Registration CG Info

5 Members Previous Inactive Pending Prospects Guests Options

Display

Add Members name Filter Person Clear

Show 10 rows

<input type="checkbox"/>	Name	MemberType	Church	Communication	% Att.	Dates	Actions
<input type="checkbox"/>	John Baptist	Leader	Member	W (214) 123-2134 database@concorddallas.org		Joined 9/12/21 0	
<input type="checkbox"/>	John Doe	Member	Member	database@concorddallas.org		Joined 9/13/21	
<input type="checkbox"/>	Jill Doed	Member	Just Added	C (214) 945-1199 database@concorddallas.org		Joined 9/13/21	
<input type="checkbox"/>	Earnest Jammer	Member	Member			Joined 9/13/21	

10



10

The person you searched for has now been successfully added to your group.

What if...?

What if the person I'm adding isn't in the database?

Viewing Your Group Members

The screenshot shows the Concord Church database interface. A modal window titled "Search for Person to Add as Member of Organization" is open. The modal contains three input fields: "First Name" with the value "Jane", "Last Name" with the value "Doe", and "Email" with the value "JaneDoeEmail@concorddallas.net". Below the input fields are "Clear" and "Search" buttons. The "Search" button is highlighted with a red box. An arrow points from a circled number "11" to the "Search" button. In the background, a table of members is visible, including entries for John B., John D., Jill Doed, and Earnest Jammer.

Name	Role	Status	Contact Info	Joined	Actions
John B.					
John D.					
Jill Doed	Member	Just Added	C (214) 945-1199 database@concorddallas.org	Joined 9/13/21	
Earnest Jammer	Member	Member		Joined 9/13/21	



11

Sometimes when you do an advanced search for someone, they will not be in our database.

Note: If you highly suspect that the person you are looking for is within the database, try doing an advanced search again for the same name with a *different* email address.

Viewing Your Group Members

12

The screenshot displays the Concord Church CRM interface. A modal window titled "Add New Person to New Family" is open, allowing for the addition of a new person to a family. The form includes the following fields:

- Title:** A dropdown menu.
- First Name:** Text input field containing "Jane".
- Middle Name:** Text input field.
- Last Name:** Text input field containing "Doe".
- Suffix:** Text input field.
- Goes By:** Text input field.
- Birthdate:** Text input field with a calendar icon.
- Email Address:** Text input field containing "JaneDoeEmail@concorddallas.net".
- Cell Phone:** Text input field.
- Gender:** Dropdown menu with "Unknown" selected.
- Marital Status:** Dropdown menu with "Unknown" selected.
- Campus:** Text input field containing "Main Campus".
- Entry Point:** Text input field containing "Online Registration".

At the bottom of the modal, there are three buttons: "Cancel All", "Cancel Person", and "Submit".

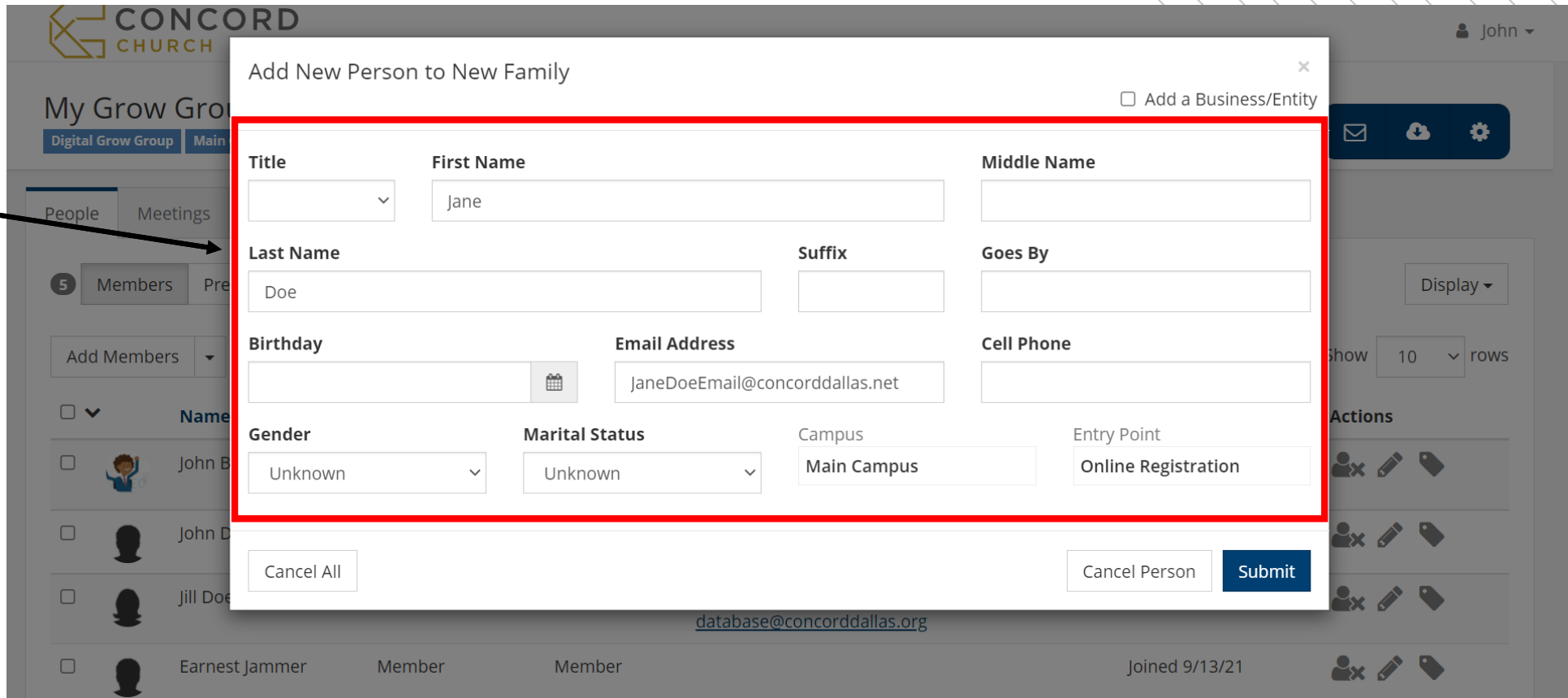
The background interface shows the "My Grow Group" section with a "Members" tab selected. A list of members is visible, including John B., John D., Jill Doe, and Earnest Jammer. The email address "database@concorddallas.org" is visible at the bottom of the page.



12

When this is true, you will be shown the “Add New Person to New Family” menu instead of the “Blue Name” that appears during [step 9](#).

Viewing Your Group Members



13

CONCORD CHURCH

My Grow Group

Digital Grow Group Main

People Meetings

5 Members Pre

Add Members

Name

John B

John D

Jill Doe

Earnest Jammer Member Member

Joined 9/13/21

database@concorddallas.org

Add New Person to New Family

Add a Business/Entity

Title First Name Middle Name

Last Name Suffix Goes By

Birthday Email Address Cell Phone

Gender Marital Status Campus Entry Point

Cancel All Cancel Person Submit



13

On this menu, you should enter in all of the information that you have about the person that you want to add to your group.

At a minimum you should add the "First Name," "Last Name," and "Email Address."

Viewing Your Group Members

CONCORD CHURCH

My Grow Group

Digital Grow Group Main

People Meetings

5 Members Pre

Add Members

Name

John B

John D

Jill D

Earnest Jammer Member Member

Joined 9/13/21

database@concorddallas.org

John

Display

Show 10 rows

Actions

Cancel All Cancel Person Submit

Add a Business/Entity

Title

First Name Jane

Middle Name

Last Name Doe

Suffix

Goes By

Birthday

Email Address JaneDoeEmail@concorddallas.net

Cell Phone

Gender Unknown

Marital Status Unknown

Campus Main Campus

Entry Point Online Registration

14



14

When done, click "Submit."

Viewing Your Group Members

CONCORD CHURCH

My Grow Group

Digital Grow Group Main

People Meetings

5 Members Pre

Add Members

Name

John B

John D

Jill Doe

Earnest Jammer Member Member

Joined 9/13/21

database@concorddallas.org

John

Display

Show 10 rows

Actions

Cancel All Cancel Person Submit

Add Address for New Family

Jane Doe

Address Line 1: 6808 Pastor Bailey Dr

Address Line 2:

City: Dallas State: TX - Texas Zip Code: 75115

Home Phone: Country: United States

15



15

You will be prompted to enter in the person's address.
Once finished click "submit."
(If you do not know the person's address, click "submit" anyway.)

Viewing Your Group Members

Add Address for New Family

Jane Doe

Address Line 1: 6808 Pastor Bailey Dr

Address Line 2:

City: Dallas State: TX - Texas Zip Code: 75237-2602

Home Phone: Country: United States

Address Found and Adjusted by USPS
What you entered
6808 Pastor Bailey Dr
Dallas, TX 75115

Buttons: Cancel All, Cancel Person, Skip Address Check, **Submit Again**

You will be shown a red or green verification screen

If it is green, the address has been verified. Click “Submit Again” to finish adding the person to the group.
If it is red, the address has not been verified. Click “Skip Address Check” to finish adding the person to the group.



16

16

Viewing Your Group Members

17

CONCORD CHURCH

My Grow Gro

Digital Grow Group Main

John

Pending List to Add as Member of Organization

Name

Jane Doe

Remove

Cancel

Another Search or

Commit and Add

Display

Show 10 rows

<input type="checkbox"/>	Name	MemberType	Church	Communication	% Att.	Dates	Actions
<input type="checkbox"/>	John Baptist	Leader	Member	W (214) 123-2134 database@concorddallas.org		Joined 9/12/21 0	
<input type="checkbox"/>	John Doe	Member	Member	database@concorddallas.org		Joined 9/13/21	
<input type="checkbox"/>	Jill Doed	Member	Just Added	C (214) 945-1199 database@concorddallas.org		Joined 9/13/21	
<input type="checkbox"/>	Earnest Jammer	Member	Member			Joined 9/13/21	



17

You will be shown one final page with the name of the person you want to add. Click, “Commit and Add” to finish.

Viewing Your Group Members

18

CONCORD CHURCH

Digital Grow Group | Main Campus | Active | Monday, 8:00 AM, Every Meeting

John

People | Meetings | Settings | Registration | CG Info

6 Members | Previous | Inactive | Pending | Prospects | Guests | Options

Add Members | name | Filter Person | Clear | Show 10 rows

<input type="checkbox"/>	Name	MemberType	Church	Communication	% Att.	Dates	Actions
<input type="checkbox"/>	John Baptist	Leader	Member	W (214) 123-2134 database@concorddallas.org		Joined 9/12/21 0	
<input type="checkbox"/>	Jane Doe	Member	Just Added	JaneDoeEmail@concorddallas.net		Joined 9/13/21	
<input type="checkbox"/>	John Doe	Member	Member	database@concorddallas.org		Joined 9/13/21	
<input type="checkbox"/>	Jill Doed	Member	Just Added	C (214) 945-1199 database@concorddallas.org		Joined 9/13/21	
<input type="checkbox"/>	Earnest Jammer	Member	Member			Joined 9/13/21	



18

The person has now been successfully added to your group.



TouchPoint Software
User Experience Storyboard:
Changing your Group Details

Changing your Group Details



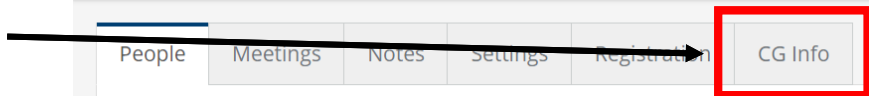
My Grow Group!

John Baptist, Esther Mord

Digital Grow Group Main Campus Active Monday, 8:00 AM, Every Meeting



1



People Meetings Notes Settings Registration **CG Info**

7 Members Previous Inactive Pending Prospects Guests Options

Add Members name Filter Person Clear Show 10 rows

<input type="checkbox"/>	Name	MemberType	Church	Communication	% Att.	Dates	Actions
<input type="checkbox"/>	John Baptist	Leader	Member	W (214) 123-2134 database@concorddallas.org		Joined 9/12/21 2	
<input type="checkbox"/>	Jane Doe	Member	Just Added	JaneDoeEmail@concorddallas.net		Joined 9/13/21 2	
<input type="checkbox"/>	John Doe	Member	Member	database@concorddallas.org		Joined 9/13/21 2	
<input type="checkbox"/>	Jill Doed	Member	Just Added			Joined 9/13/21 2	



1

Once you are within your group and viewing your Group Members on the “People Tab,” click the Tab “CG Info.”
(For steps on how to view your group members, please see “Step 3 – Viewing Your Group Members.”)

Changing your Group Details

2

CONCORD CHURCH

My Grow Group!

John Baptist, Esther Mord

Digital Grow Group Main Campus Active Monday, 8:00 AM, Every Meeting

People Meetings Notes Settings Registration CG Info

Extra Community Group Data

Type	Singles or Couples
Coed	Singles
Age Group	AgeRange
Adult	30+
Day of Week	Meeting Time
Thursday	Morning
Group Description	



2

On the CG Info page, you will find many of the categories that affect your grow group. Click any of the blue categories to change them.

Changing your Group Details

CONCORD CHURCH

My Grow Group!

John Baptist, Esther Mord

Digital Grow Group Main Campus Active Monday, 8:00 AM, Every Meeting

People Meetings Notes Settings Registration CG Info

Extra Community Group Data Refresh

Type

- Coed
- Coed
- Men
- Women
- 30+

Meeting Time

Singles or Couples

[Singles](#)

Age Group

[Adult](#)

Day of Week

[Thursday](#)

Group Description



3

Make your selection (or Edit) to the category and click the “blue checkmark” to save the change.

Changing your Group Details

4

My Grow Group!

John Baptist, Esther Mord

Digital Grow Group Main Campus Active Monday, 8:00 AM, Every Meeting

People Meetings Notes Settings Registration CG Info

Extra Community Group Data

Refresh

Type Coed	Singles or Couples Singles
Age Group Adult	AgeRange 30+
Day of Week Thursday	Meeting Time Morning
Group Description	



4

To change the name of your group, click on the name at the top left corner of the screen.

Changing your Group Details

CONCORD CHURCH

My Grow Group!

John Baptist, Esther Mord

Digital Grow Group Main Campus Active **Monday, 8:00 AM, Every Meeting**

People Meetings Notes Settings Registration **CG Info**

Extra Community Group Data

Type	Singles or Couples
Coed	Singles
Age Group	AgeRange
Adult	30+
Day of Week	Meeting Time
Thursday	Morning
Group Description	



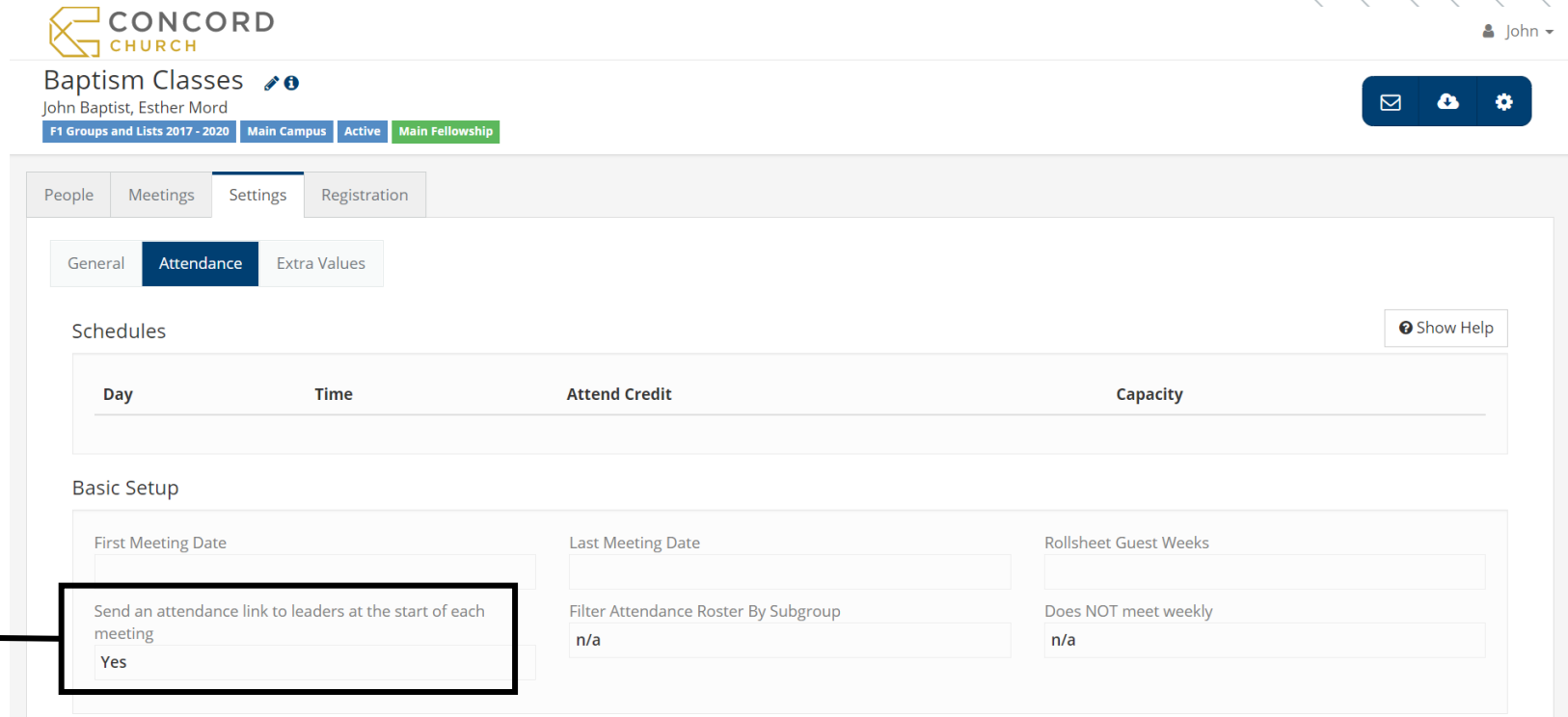
5

Some things (such as your group schedule) can only be changed by a Concord staff member. If you need to make any edits that aren't on this screen, please email database@concorddallas.org with your request.



TouchPoint Software
User Experience Storyboard:
Taking Attendance - via Automated Links

Taking Attendance - via Automated Links



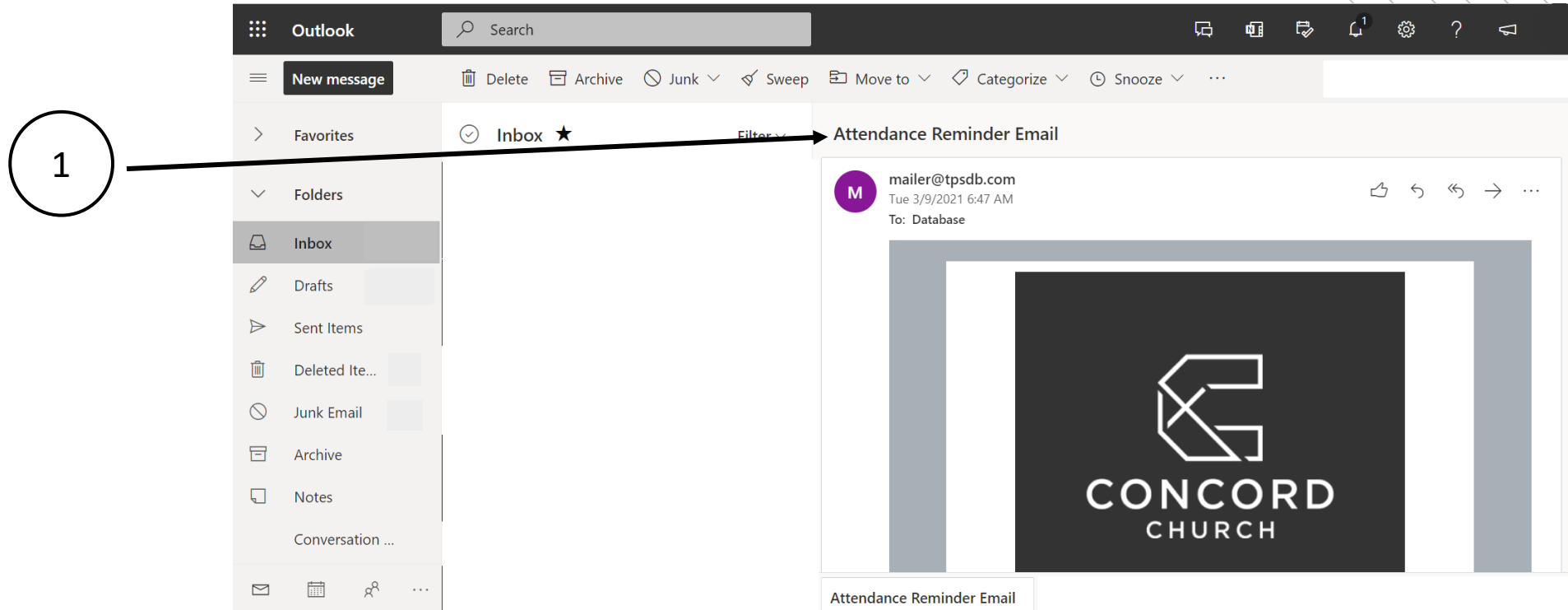
The screenshot shows the 'CONCORD CHURCH' logo and the page title 'Baptism Classes'. Below the title, there are tabs for 'People', 'Meetings', 'Settings', and 'Registration'. The 'Settings' tab is active, and within it, the 'Attendance' sub-tab is selected. The 'Attendance' section includes a 'Schedules' table with columns for 'Day', 'Time', 'Attend Credit', and 'Capacity'. Below this is the 'Basic Setup' section with several input fields: 'First Meeting Date', 'Last Meeting Date', 'Rollsheet Guest Weeks', 'Filter Attendance Roster By Subgroup' (with 'n/a' selected), and 'Does NOT meet weekly' (with 'n/a' selected). A callout box with a circled '0' points to the checkbox 'Send an attendance link to leaders at the start of each meeting', which is checked.



0

Before you can receive Attendance links, the section above must be set to "Yes."
You can check on your Group Page > Settings > Attendance.
If it is not, please contact Database@concorddallas.org

Taking Attendance - via Automated Links

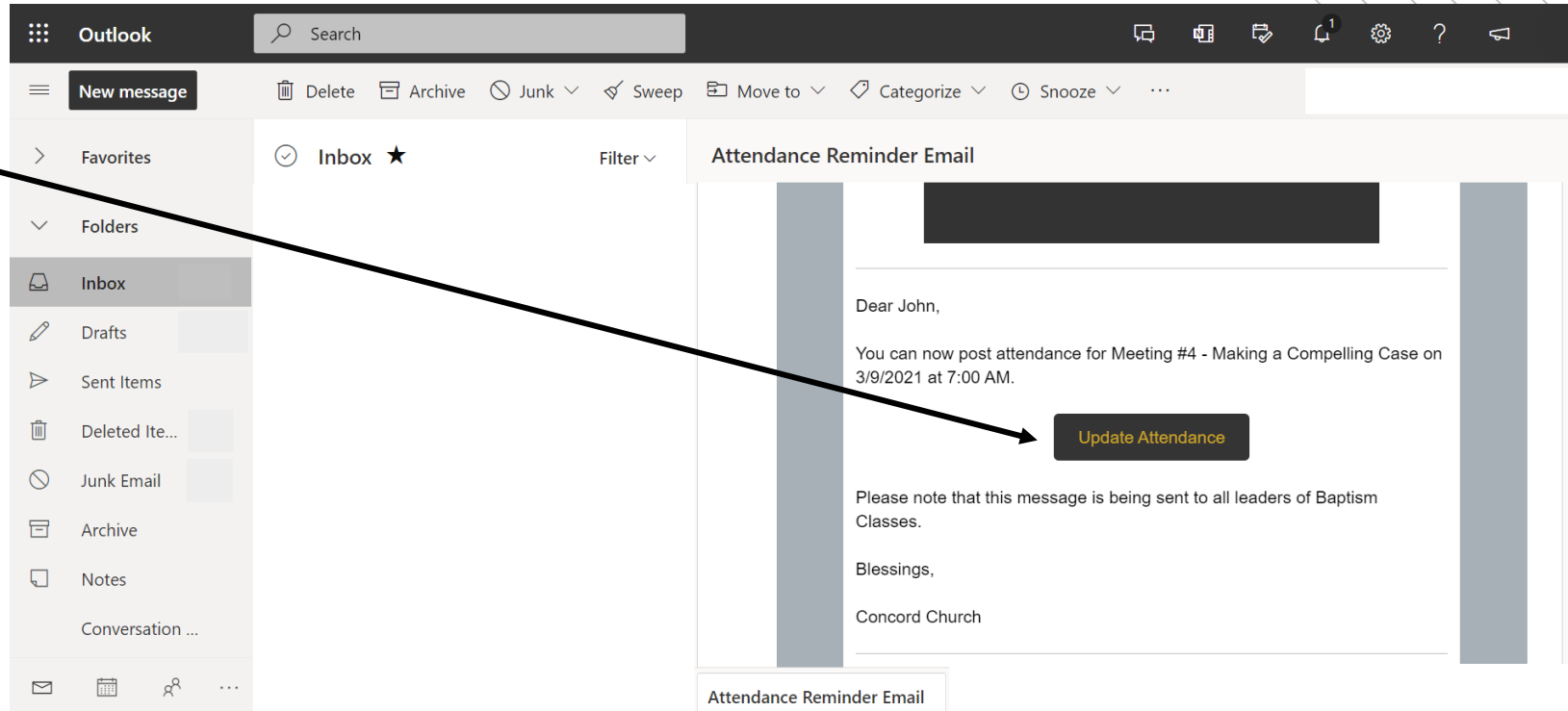


1

You should receive an “Attendance Reminder Email” (or Text) 15 Minutes prior to any meeting in any of your groups.

Taking Attendance - via Automated Links

2

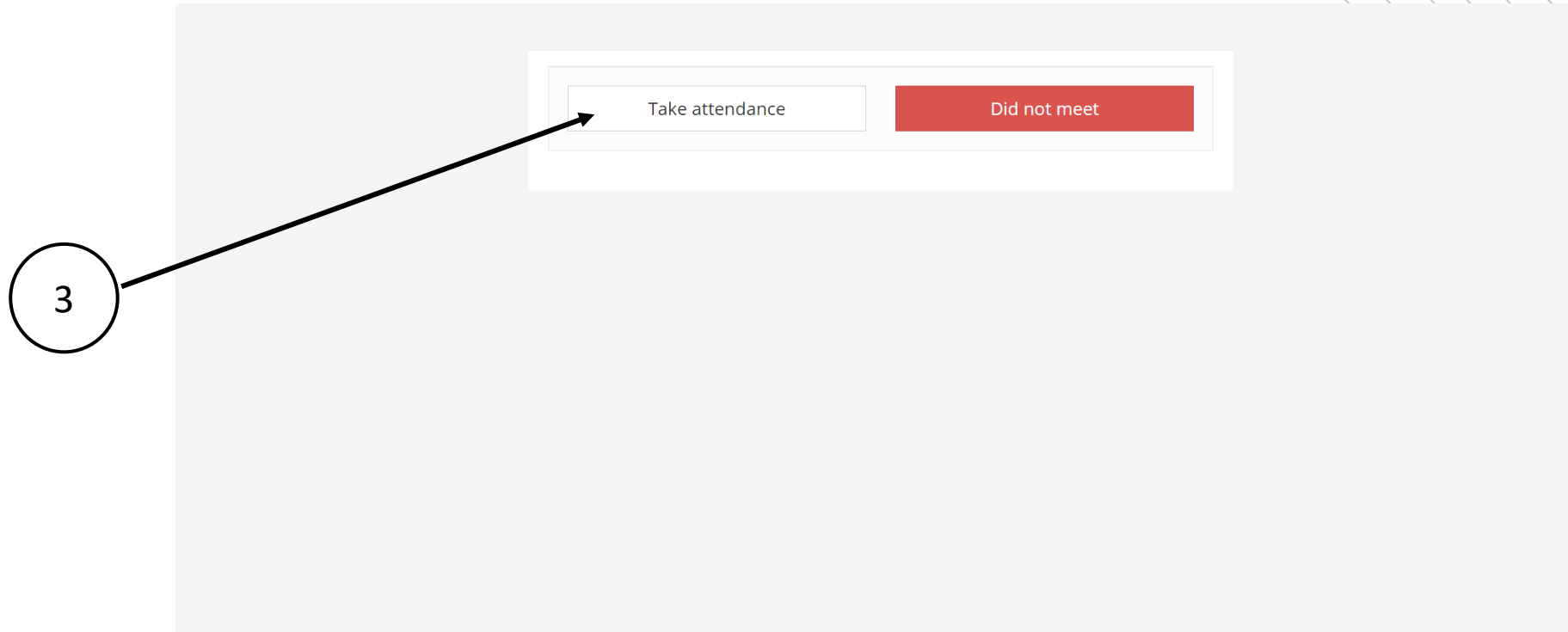


2

Within the Attendance Reminder Email, click on “Update Attendance.”

(The text version will give you a link that looks like this: <https://tpsdb.co/T2I9L>)

Taking Attendance - via Automated Links









3

You will be taken to the initial Meeting screen.
Click, "Take Attendance."
(If your group did not meet, click "Did Not Meet.")

Taking Attendance - via Automated Links

Baptism Classes
3/9/2021 7:00 AM
Meeting #4 - Making a Compelling Case

Members 0 Guests 0 Headcount 0

<input type="checkbox"/>	 Baptist, John Leader
<input type="checkbox"/>	 Brasfield, Cedric, Sr. Member
<input type="checkbox"/>	 Helton, Tina Member
<input type="checkbox"/>	 Jammer, Earnest Member
<input type="checkbox"/>	 Mord, Esther Leader
<input type="checkbox"/>	 S'ling, David Member

4



4

You will be shown a list of your group Members.

Taking Attendance - via Automated Links

5

Baptism Classes
3/9/2021 7:00 AM
Meeting #4 - Making a Compelling Case

Members 4 Guests 0 Headcount 0

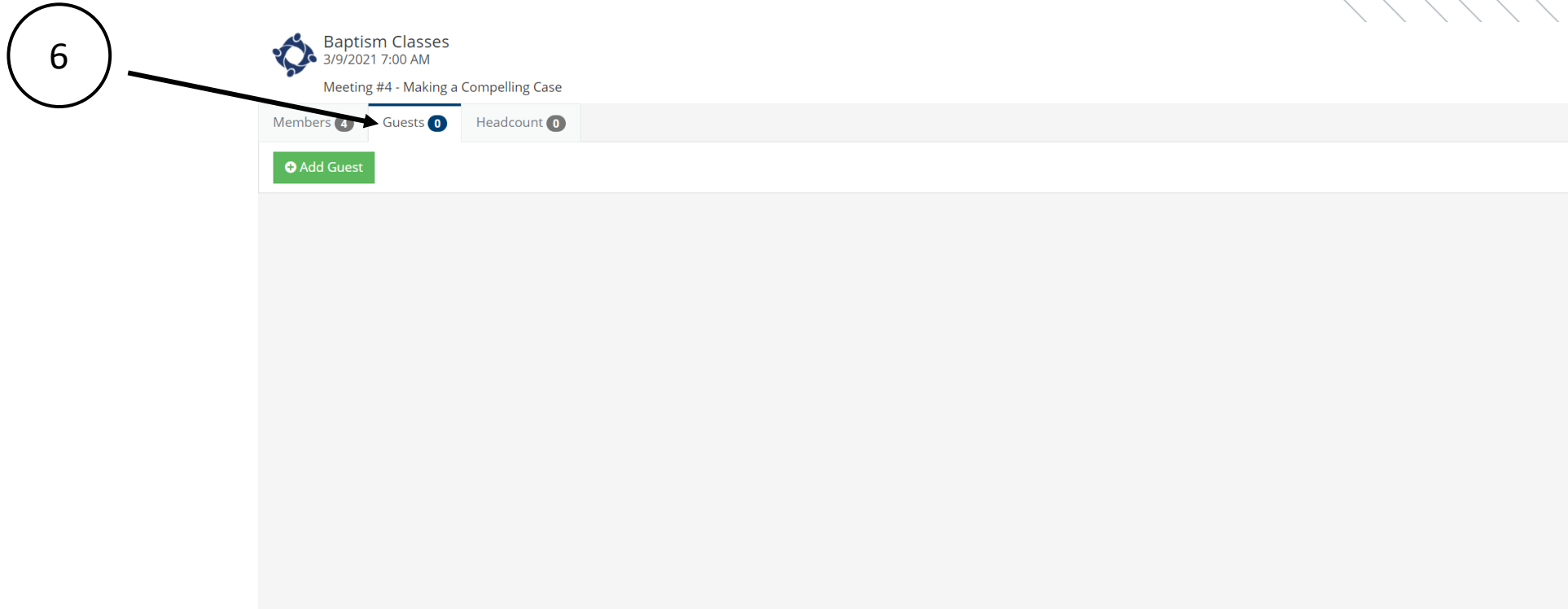
<input checked="" type="checkbox"/>	Baptist, John Leader
<input type="checkbox"/>	Brasfield, Cedric, Sr. Member
<input checked="" type="checkbox"/>	Helton, Tina Member
<input type="checkbox"/>	Jammer, Earnest Member
<input checked="" type="checkbox"/>	Mord, Esther Leader
<input checked="" type="checkbox"/>	S'ling, David Member



5

Similar to the default attendance screen, click on the checkboxes next to a person's name to record them as attended.

Taking Attendance - via Automated Links

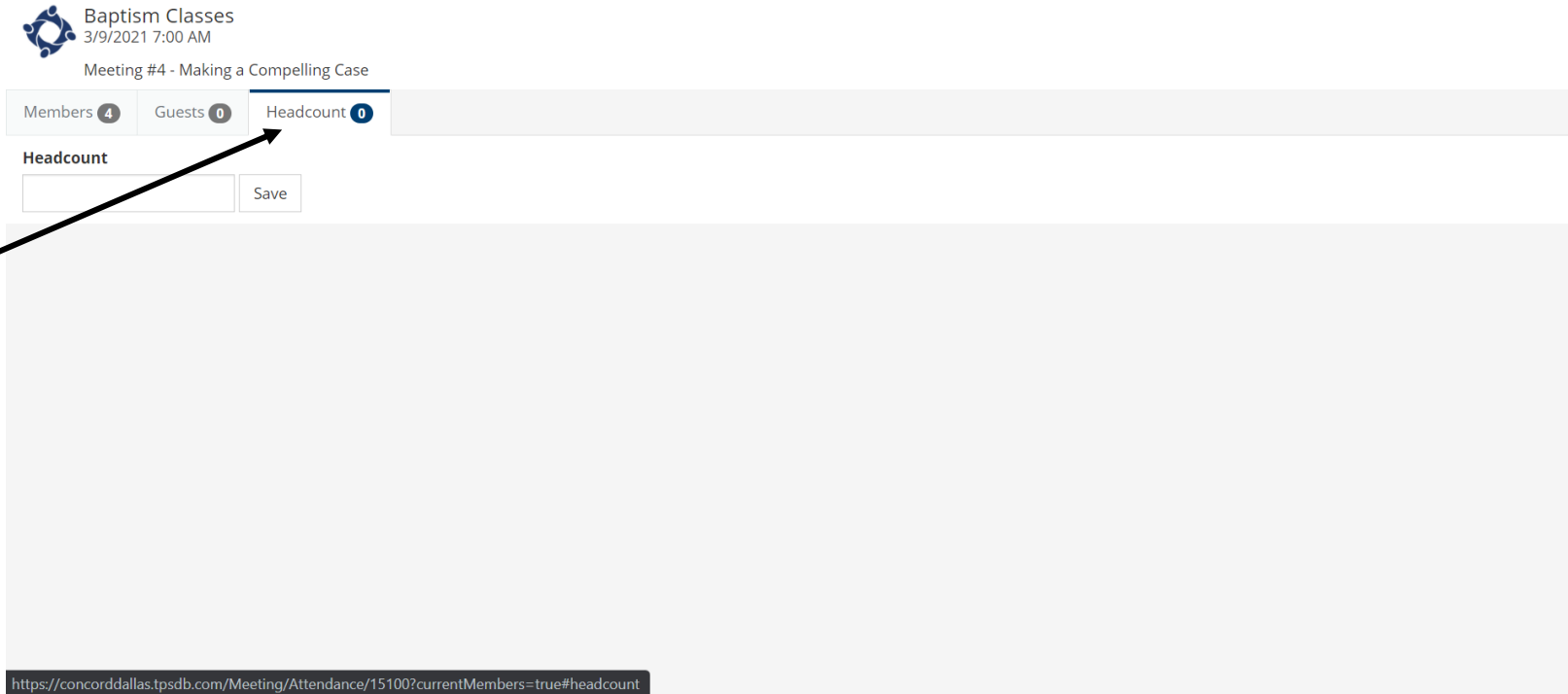


6

If you have un-registered guests at your meeting, you can add them.
Click on the “Guests” Tab then “Add Guests.”*

*See “Adding a User – As a Volunteer Leader”
for More information on Adding Guests.

Taking Attendance - via Automated Links

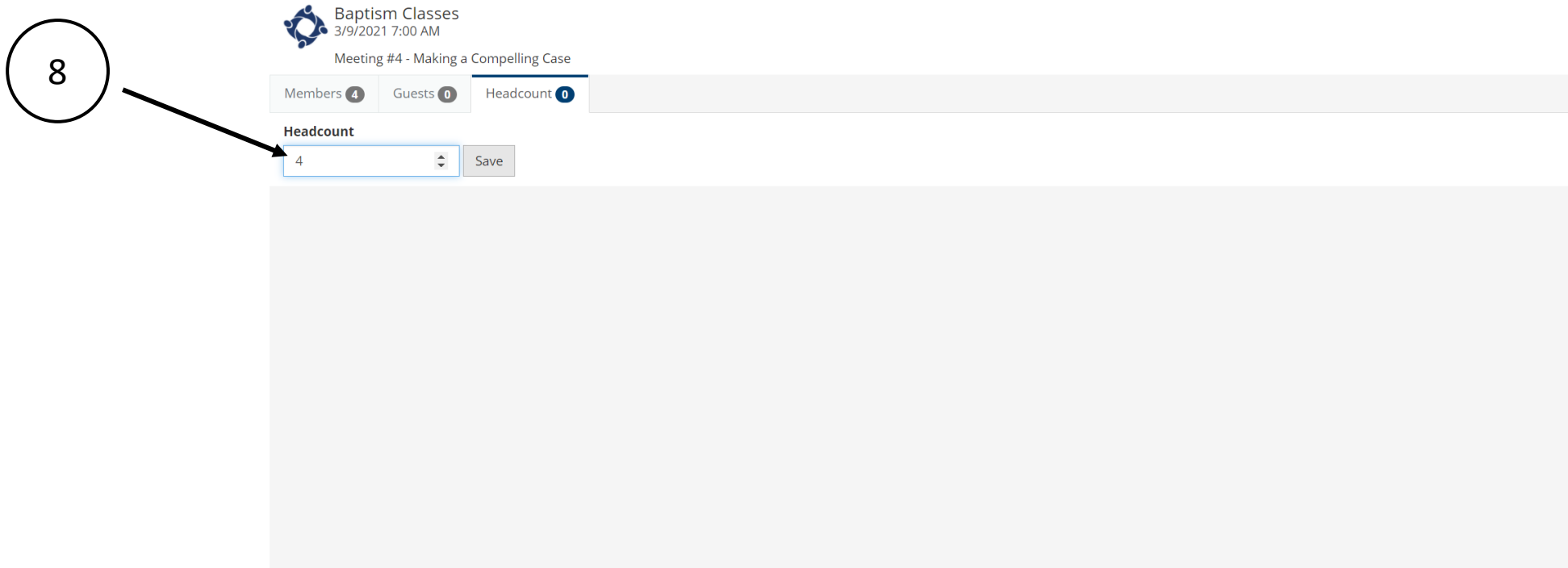


7

If there are too many individuals to take attendance for manually, you may also record a headcount.**
Click on the Tab "Headcount."

**Recording a Headcount will not add an attendance mark to a person's profile. It is recommended to only be used in extreme situations.

Taking Attendance - via Automated Links



Baptism Classes
3/9/2021 7:00 AM
Meeting #4 - Making a Compelling Case

Members 4 Guests 0 Headcount 0

Headcount

4 Save



8

If you decide to use Headcount, type in the number of individuals into the Headcount field.

Taking Attendance - via Automated Links

Baptism Classes
3/9/2021 7:00 AM
Meeting #4 - Making a Compelling Case

Members 4 Guests 0 Headcount 4

Headcount

4 Save

<https://concorddallas.tpsdb.com/Meeting/Attendance/15100?currentMembe...>



9

Remember to click, "Save."



TouchPoint Software
User Experience Storyboard:
Taking Attendance - via Desktop

Taking Attendance – Via Desktop

CONCORD CHURCH

John Baptist

6808 Pastor Bailey Dr, Dallas, TX
database@concorddallas.org

Primary Adult No Campus Just Added NMT-S1 Is Leader

Personal Involvement Profile Ministry Giving Communications

General

Title First Name Middle Name Suffix Last Name
Goes By Alt Name Former Name Gender
Marital Status Birthday Wedding Date Deceased Date

Communication

Primary Email Alt Email
database@concorddallas.org



1

After Logging In, click on the “Involvement” Tab.

Taking Attendance – Via Desktop

The screenshot shows the member profile for John Baptist. The 'Involvement' tab is active, and the 'Current' sub-tab is highlighted in blue. The table below shows one record for 'Baptism Classes' with an attendance percentage of 100.0.

Involvement	Leader	Enroll Date	MemberType	AttendPct
Baptism Classes	Esther Mord	3/9/2021	Leader	100.0

2



2

In the Involvement Tab, click on “Current” and make sure it turns Blue.

Taking Attendance – Via Desktop

CONCORD CHURCH

John Baptist

6808 Pastor Bailey Dr, Dallas, TX
database@concorddallas.org

Primary Adult No Campus Just Added NMT-S1 Is Leader

Personal Involvement Profile Ministry Giving Communications

Current Previous Pending Attendance Registrations

Show 10 rows of types

Involvement	Leader	Enroll Date	MemberType	AttendPct
F1 Groups and Lists 2017 - 2020				
Baptism Classes	Esther Mord	3/9/2021	Leader	100.0

Showing 1 of 1 records

Concord Church (214) 331-8522 concordtouchpointadmin@concorddallas.org

https://concorddallas.tpsdb.com/Person2/94939#enrollment

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3

3

Look for the group that you want to send emails to. Once found, click on the “Name” of the group.



Taking Attendance – Via Desktop

Quick Note*

The screenshot shows the member profile for John Baptist. The 'Attendance' tab is selected, displaying a table with the following data:

Involvement	Leader	Enroll Date	MemberType	AttendPct
F1 Groups and Lists 2017 - 2020			Leader	100.0
Baptism Classes	Esther Mord	3/9/2021		

A callout bubble with '3*' points to the 'Leader' text in the MemberType column of the first row.



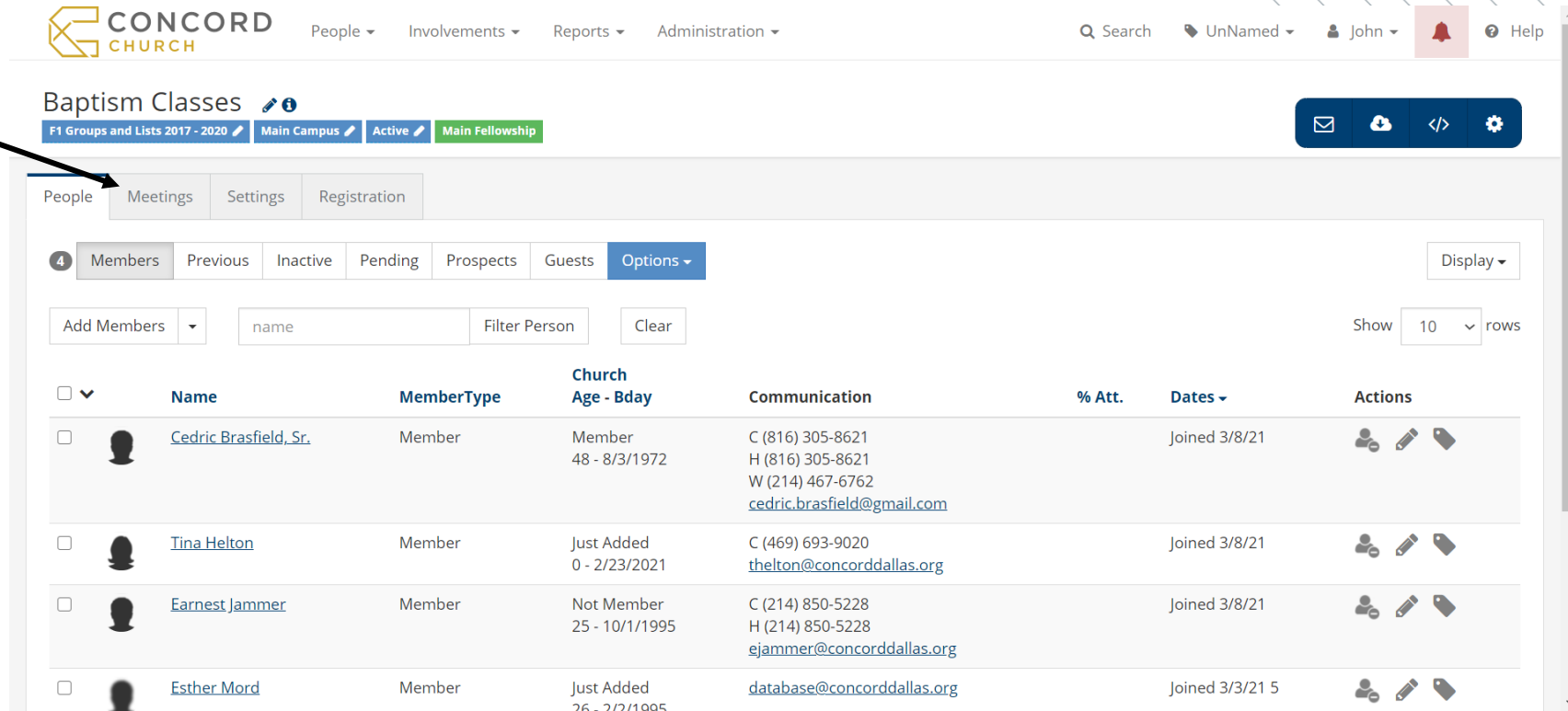
3*

You will only be able to enter your group's page if you are a "Leader" within the group.

If you do not see the word, "Leader" under "MemberType" please contact the person responsible for your group at Concord. Tell them that you need to be a leader in your TouchPoint group.

Taking Attendance – Via Desktop

4



The screenshot shows the Concord Church website interface. At the top, there is a navigation bar with the church logo, 'CONCORD CHURCH', and menu items: 'People', 'Involvements', 'Reports', and 'Administration'. On the right, there is a search bar and user information for 'John'. Below the navigation bar, the page title is 'Baptism Classes'. There are several tabs: 'F1 Groups and Lists 2017 - 2020', 'Main Campus', 'Active', and 'Main Fellowship'. A secondary navigation bar contains 'People', 'Meetings', 'Settings', and 'Registration'. Below this, there are more tabs: 'Members', 'Previous', 'Inactive', 'Pending', 'Prospects', 'Guests', and 'Options'. A search bar with 'name' and 'Filter Person' is present. A table lists members with columns for Name, MemberType, Church Age - Bday, Communication, % Att., Dates, and Actions. The table contains four rows of member data.

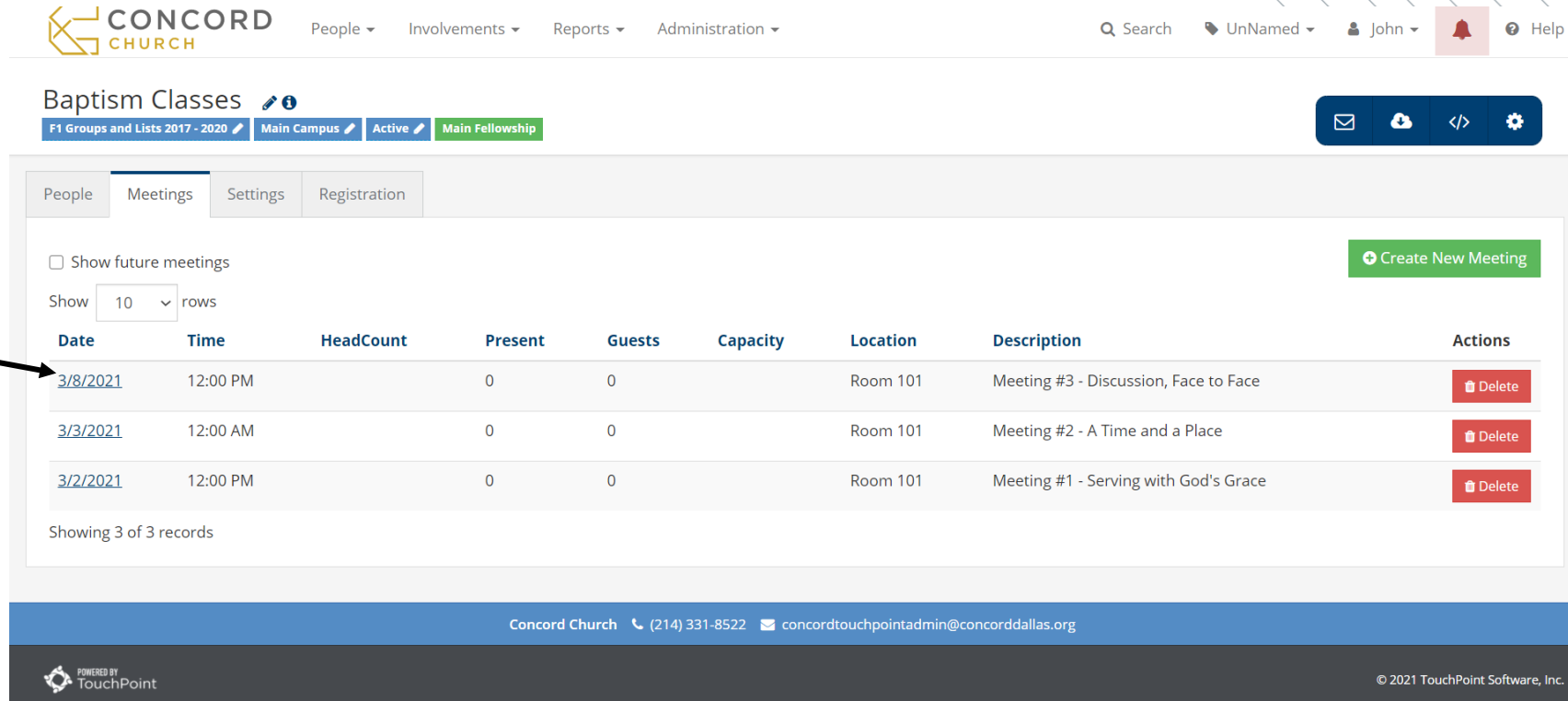
<input type="checkbox"/>	Name	MemberType	Church Age - Bday	Communication	% Att.	Dates	Actions
<input type="checkbox"/>	Cedric Brasfield, Sr.	Member	Member 48 - 8/3/1972	C (816) 305-8621 H (816) 305-8621 W (214) 467-6762 cedric.brasfield@gmail.com		Joined 3/8/21	
<input type="checkbox"/>	Tina Helton	Member	Just Added 0 - 2/23/2021	C (469) 693-9020 thelton@concorddallas.org		Joined 3/8/21	
<input type="checkbox"/>	Earnest Jammer	Member	Not Member 25 - 10/1/1995	C (214) 850-5228 H (214) 850-5228 ejammer@concorddallas.org		Joined 3/8/21	
<input type="checkbox"/>	Esther Mord	Member	Just Added 26 - 2/2/1995	database@concorddallas.org		Joined 3/3/21 5	



4

On your Group Page, click the Meetings Tab.

Taking Attendance – Via Desktop



The screenshot displays the 'Baptism Classes' page in the Concord Church software. The page includes a navigation bar with 'People', 'Involvements', 'Reports', and 'Administration'. The main content area shows a table of meetings with columns for Date, Time, HeadCount, Present, Guests, Capacity, Location, Description, and Actions. A circled number '5' with an arrow points to the 'Date' column of the first row.

Date	Time	HeadCount	Present	Guests	Capacity	Location	Description	Actions
3/8/2021	12:00 PM	0	0	0		Room 101	Meeting #3 - Discussion, Face to Face	Delete
3/3/2021	12:00 AM	0	0	0		Room 101	Meeting #2 - A Time and a Place	Delete
3/2/2021	12:00 PM	0	0	0		Room 101	Meeting #1 - Serving with God's Grace	Delete



5

Click the “date” of the meeting you want to take attendance for.

Taking Attendance – Via Desktop

6

The screenshot shows the Concord Church desktop interface. At the top left is the Concord Church logo. Navigation tabs include People, Involvements, Reports, and Administration. A search bar and user profile (UnNamed, John) are on the right. The main content area is titled "Baptism Classes". Below the title, there is a "Meeting" dropdown set to "3/8/2021 12:00 PM" and a "Meeting Type" dropdown with options "Regular" and "Every Meeting". To the right of these is a "Did not meet" checkbox. Below this is a "Description" field containing "Meeting #3 - Discussion, Face to Face". A table is displayed with columns: "Attended", "Name", "Current Member Type", "Attend Member Type", and "Attend Type". Above the table are controls for "Showing Attends", "Enable", "Editing", "Register", and an "Add Guests" button. On the right side, there is an "Attendance Summary" panel with "HeadCount: Empty" and statistics for Present, Members, New Guests, Repeat Guests, and Visiting Members, all showing 0. Below that is a "Record Attendance" panel with a "Wand Target" input field. The footer contains contact information for Concord Church.



6

If your group did not meet on the meeting date, click “Did not meet.”

Taking Attendance – Via Desktop

7

CONCORD CHURCH People ▾ Involvements ▾ Reports ▾ Administration ▾

Meeting: 3/8/2021 12:00 PM Meeting Type: Regular | Every Meeting Did not meet

Description: Meeting #3 - Discussion, Face to Face

Showing Attends ▾
All
Attends
Absents
Registered
Current Members
Record by Family

Enable Editing Register [+ Add Guests](#)

Name	Current Member Type	Attend Member Type	Attend Type
------	---------------------	--------------------	-------------

Attendance Summary

HeadCount:	Empty		
Present:	0	New Guests:	0
Members:	0	Repeat Guests:	0
		Visiting Members:	0

Record Attendance

Wand Target

Concord Church (214) 331-8522 concordtouchpointadmin@concorddallas.org



7

Click "Showing Attends."

Taking Attendance – Via Desktop

8

CONCORD CHURCH People ▾ Involvements ▾ Reports ▾ Administration ▾

Meeting: 3/8/2021 12:00 PM Meeting Type: Regular | Every Meeting Did not meet

Description: Meeting #3 - Discussion, Face to Face

Showing Attends ▾

- All
- Attends
- Absents
- Registered
- Current Members
- Record by Family

Enable Editing Register [+ Add Guests](#)

Current Member Type	Attend Member Type	Attend Type
---------------------	--------------------	-------------

Attendance Summary

HeadCount:	Empty		
Present:	0	New Guests:	0
Members:	0	Repeat Guests:	0
		Visiting Members:	0

Record Attendance

Wand Target

Concord Church (214) 331-8522 concordtouchpointadmin@concorddallas.org



8

Click “All” to display all members in your group.

Taking Attendance – Via Desktop

9

The screenshot shows the 'Baptism Classes' page on the Concord Church website. The page includes a navigation bar with 'CONCORD CHURCH' logo and menu items like 'People', 'Involvements', 'Reports', and 'Administration'. The main content area shows the meeting details: 'Meeting' 3/8/2021 12:00 PM, 'Meeting Type' Regular | Every Meeting, and 'Description' Meeting #3 - Discussion, Face to Face. Below this is a table of attendees with columns for 'Attended', 'Name', 'Current Member Type', 'Attend Member Type', and 'Attend Type'. The 'Attended' column has checkboxes for each member. To the right of the table is an 'Attendance Summary' box showing 'HeadCount: Empty', 'Present: 0', 'New Guests: 0', 'Members: 0', 'Repeat Guests: 0', and 'Visiting Members: 0'. Below the summary is a 'Record Attendance' box with a 'Wand Target' input field. At the bottom of the page, there is a footer with contact information for Concord Church.

Showing All ▾ Enable Editing Register + Add Guests

Attended	Name	Current Member Type	Attend Member Type	Attend Type
<input type="checkbox"/>	Brasfield, Cedric, Sr.	Member		
<input type="checkbox"/>	Helton, Tina	Member		
<input type="checkbox"/>	Jammer, Earnest	Member		
<input type="checkbox"/>	Mord, Esther	Member		

Attendance Summary

HeadCount: Empty

Present: 0 New Guests: 0

Members: 0 Repeat Guests: 0

Visiting Members: 0

Record Attendance

Wand Target

Concord Church (214) 331-8522 concordtouchpointadmin@concorddallas.org



9

Check “Editing” to enable attendance to be recorded.

Taking Attendance – Via Desktop

10

CONCORD CHURCH People ▾ Involvements ▾ Reports ▾ Administration ▾

Meeting: 3/8/2021 12:00 PM Meeting Type: Regular | Every Meeting Did not meet

Description: Meeting #3 - Discussion, Face to Face

Showing All ▾ Enable Editing Register [+ Add Guests](#)

Attended	Name	Current Member Type	Attend Member Type	Attend Type
<input checked="" type="checkbox"/>	Brasfield, Cedric, Sr.	Member		
<input checked="" type="checkbox"/>	Helton, Tina	Member		
<input type="checkbox"/>	Jammer, Earnest	Member		
<input type="checkbox"/>	Mord, Esther	Member		

Attendance Summary

HeadCount: **Empty**

Present: 2 New Guests: 0

Members: 2 Repeat Guests: 0

Visiting Members: 0

Record Attendance

Wand Target

Concord Church (214) 331-8522 concordtouchpointadmin@concorddallas.org



10

Click the Checkbox next to each person to record them as attended. The person's row will glow yellow when they have successfully been recorded.

Taking Attendance – Via Desktop

11

CONCORD CHURCH People ▾ Involvements ▾ Reports ▾ Administration ▾

Meeting: 3/8/2021 12:00 PM Meeting Type: Regular | Every Meeting Did not meet

Description: Meeting #3 - Discussion, Face to Face

Showing All ▾ Enable Editing Register [+ Add Guests](#)

Attended	Name	Current Member Type	Attend Member Type	Attend Type
<input checked="" type="checkbox"/>	Brasfield, Cedric, Sr.	Member		
<input checked="" type="checkbox"/>	Helton, Tina	Member		
<input type="checkbox"/>	Jammer, Earnest	Member		
<input type="checkbox"/>	Mord, Esther	Member		

Attendance Summary
HeadCount: Empty
Present: 2 New Guests: 0
Members: 2 Repeat Guests: 0
Visiting Members: 0

Record Attendance
Wand Target

Concord Church (214) 331-8522 concordtouchpointadmin@concorddallas.org



11

Once your attendance has been recorded, you can go back to your group by clicking on the “name of your group” in the top left corner.

Taking Attendance – Via Desktop

CONCORD CHURCH People ▾ Involvements ▾ Reports ▾ Administration ▾

Meeting: 3/8/2021 12:00 PM Meeting Type: Regular | Every Meeting Did not meet

Description: Meeting #3 - Discussion, Face to Face

Showing All ▾

Enable Editing Register + Add Guests

	Current Member Type	Attend Member Type	Attend Type
Field, Cedric, Sr.	Member		
n, Tina	Member		
er, Earnest	Member		
, Esther	Member		

Attendance Summary

HeadCount: Empty

Present: 2 New Guests: 0

Members: 2 Repeat Guests: 0

Visiting Members: 0

Record Attendance

Wand Target

<https://concorddallas.tpsdb.com/Meeting/15099#> Concord Church (214) 331-8522 concordtouchpointadmin@concorddallas.org

12



12

If you want to sort the attendance list, you can do so with the options under the “Showing” button.

Taking Attendance – Via Desktop

CONCORD CHURCH

People ▾ Involvements ▾ Reports ▾ Administration ▾

Search UnNamed ▾ John ▾ Help

Baptism Classes

Meeting 3/8/2021 12:00 PM Meeting Type Regular | Every Meeting Did not meet

Description Meeting #3 - Discussion, Face to Face

Showing All ▾ Enable Editing Register + Add Guests

	Current Member Type	Attend Member Type	Attend Type
Field, Cedric, Sr.	Member		
n, Tina	Member		
er, Earnest	Member		
, Esther	Member		

Attendance Summary

HeadCount: Empty

Present:	2	New Guests:	0
Members:	2	Repeat Guests:	0
		Visiting Members:	0

Record Attendance

Wand Target

<https://concorddallas.tpsdb.com/Meeting/15099#> Concord Church (214) 331-8522 concordtouchpointadmin@concorddallas.org

13



13

Click “Attends” to view all individuals who are marked as present.

Taking Attendance – Via Desktop

The screenshot shows the Concord Church website interface for taking attendance. At the top, the logo for Concord Church is visible, along with navigation menus for People, Involvements, Reports, and Administration. The page title is 'Baptism Classes'. Below the title, there are fields for 'Meeting' (3/8/2021 12:00 PM), 'Meeting Type' (Regular | Every Meeting), and a checkbox for 'Did not meet'. A description reads 'Meeting #3 - Discussion, Face to Face'. A dropdown menu labeled 'Showing Attends' is open, with options: All, Absents, Registered, Current Members, and Record by Family. The 'Absents' option is highlighted. Below the menu is a table with columns: Current Member Type, Attend Member Type, and Attend Type. Two rows are visible, both with 'Member' in the first two columns. To the right of the table is an 'Attendance Summary' box showing HeadCount: Empty, Present: 2, New Guests: 0, Members: 2, Repeat Guests: 0, and Visiting Members: 0. Below that is a 'Record Attendance' box with a 'Wand Target' input field. At the bottom, there is a footer with the website URL, Concord Church name, phone number, and email address.



14

Click “Absents” to view all individuals who have not been marked as present.

Taking Attendance – Via Desktop

15

The screenshot shows the Concord Church desktop interface. At the top, there is a navigation bar with the Concord Church logo, menu items (People, Involvements, Reports, Administration), a search bar, and user information (UnNamed, John). The main content area is titled 'Baptism Classes' and shows a meeting for 3/8/2021 at 12:00 PM. The meeting type is 'Regular | Every Meeting' and there is a 'Did not meet' checkbox. The description is 'Meeting #3 - Discussion, Face to Face'. Below this is a table with columns: 'Attended', 'Name', 'Current Member Type', 'Attend Member Type', and 'Attend Type'. The table contains four rows of members: Brasfield, Cedric, Sr.; Helton, Tina; Jammer, Earnest; and Mord, Esther. To the right of the table is a green 'Add Guests' button. Further right is an 'Attendance Summary' box showing 'HeadCount: Empty', 'Present: 2', 'New Guests: 0', 'Members: 2', 'Repeat Guests: 0', and 'Visiting Members: 0'. Below that is a 'Record Attendance' box with a 'Ward Target' input field. At the bottom, there is a footer with the URL 'https://concorddallas.tpsdb.com/SearchAdd2/Dialog/visitor/15099' and contact information for Concord Church.



15

Click Add Guests, to add un-registered guests to the attendance sheet.*

Taking Attendance – Via Desktop

CONCORD CHURCH

People ▾ Involvements ▾ Reports ▾ Administration ▾

Search UnNamed ▾ John ▾ Help

Baptism Classes

Meeting 3/8/2021 12:00 PM Meeting Type Regular | Every Meeting Did not meet

Description Meeting #3 - Discussion, Face to Face

Showing All ▾ Enable Editing Register

Attended	Name	Current Member Type	Attend Member Type	Attend Ty
<input checked="" type="checkbox"/>	Brasfield, Cedric, Sr.	Member	Member	Member
<input checked="" type="checkbox"/>	Helton, Tina	Member	Member	Member
<input type="checkbox"/>	Jammer, Earnest	Member		
<input type="checkbox"/>	Mord, Esther	Member		

Record Attendance

Wand Target

https://concorddallas.tpsdb.com/Meeting/iPad/15099

Concord Church (214) 331-8522 concordtouchpointadmin@concorddallas.org

16



16

Lastly, if you want to change the screen to a simplified view, click the “Cloud Button” in the blue Toolbar.

Taking Attendance – Via Desktop

CONCORD CHURCH

People ▾ Involvements ▾ Reports ▾ Administration ▾

Search UnNamed ▾ John ▾ Help

Baptism Classes

Meeting 3/8/2021 12:00 PM Meeting Type Regular | Every Meeting Did not meet

Description Meeting #3 - Discussion, Face to Face

Showing All ▾ Enable Editing Register

Attended	Name	Current Member Type	Attend Member Type	Attend Ty
<input checked="" type="checkbox"/>	Brasfield, Cedric, Sr.	Member	Member	Member
<input checked="" type="checkbox"/>	Helton, Tina	Member	Member	Member
<input type="checkbox"/>	Jammer, Earnest	Member		
<input type="checkbox"/>	Mord, Esther	Member		

Reports

- Rollsheet Report
- Recent Attendance Report
- Attendee Report
- Guests/Absentees Report
- Guests/Absentees Contact Report
- Attendance By Groups

Special Pages

- iPad Attendance**
- iPad Attendance Registered Only

Record Attendance

Wand Target

https://concorddallas.tpsdb.com/Meeting/iPad/15099

Concord Church (214) 331-8522 concordtouchpointadmin@concorddallas.org

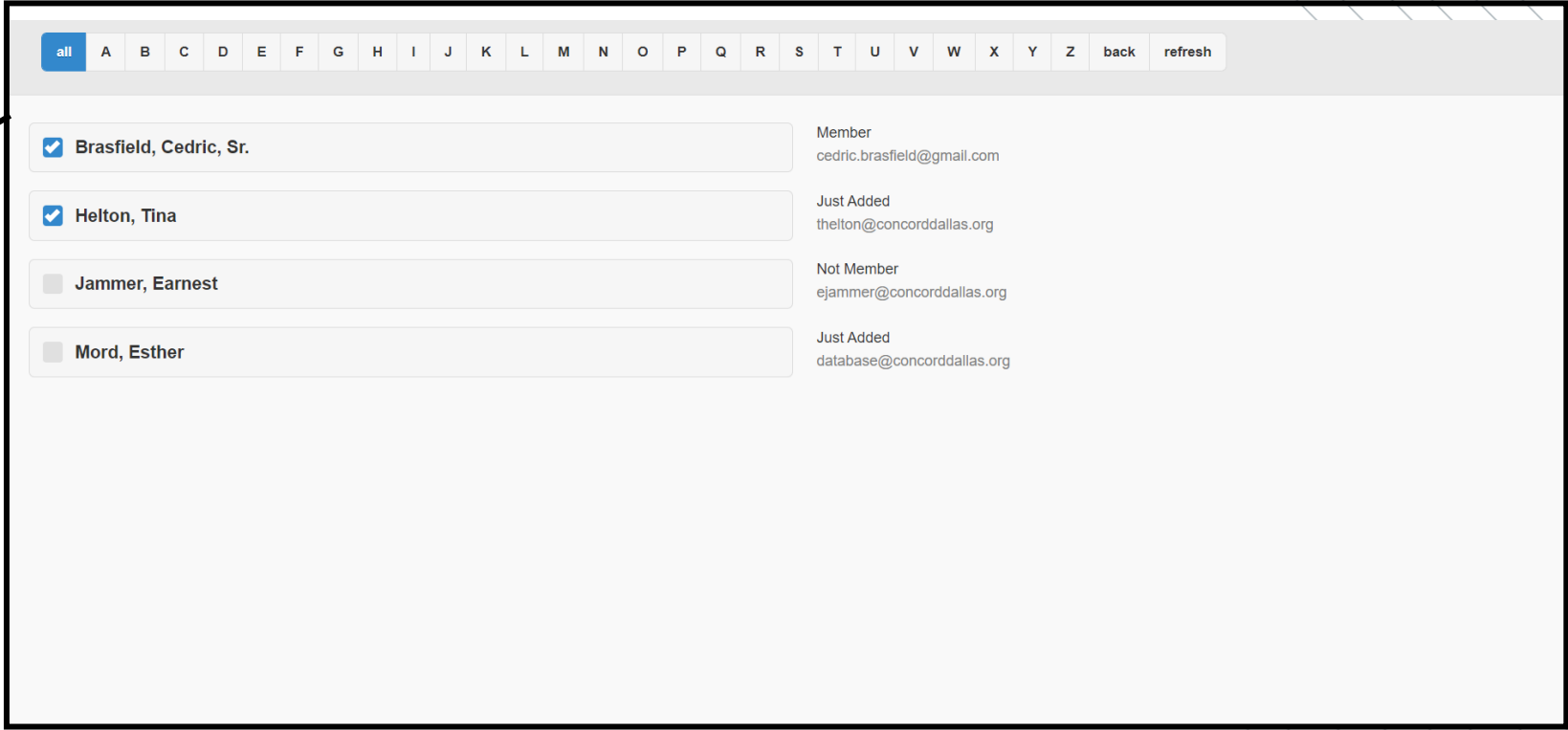


17

Click iPad Attendance.

Taking Attendance – Via Desktop

18



The screenshot shows a web interface for taking attendance. At the top, there is a navigation bar with a dropdown menu currently set to 'all', followed by letters A through Z, and buttons for 'back' and 'refresh'. Below this is a list of four members, each with a checkbox on the left and their status and email address on the right.

Member Name	Status	Email Address
<input checked="" type="checkbox"/> Brasfield, Cedric, Sr.	Member	cedric.brasfield@gmail.com
<input checked="" type="checkbox"/> Helton, Tina	Just Added	thelton@concorddallas.org
<input type="checkbox"/> Jammer, Earnest	Not Member	ejammer@concorddallas.org
<input type="checkbox"/> Mord, Esther	Just Added	database@concorddallas.org

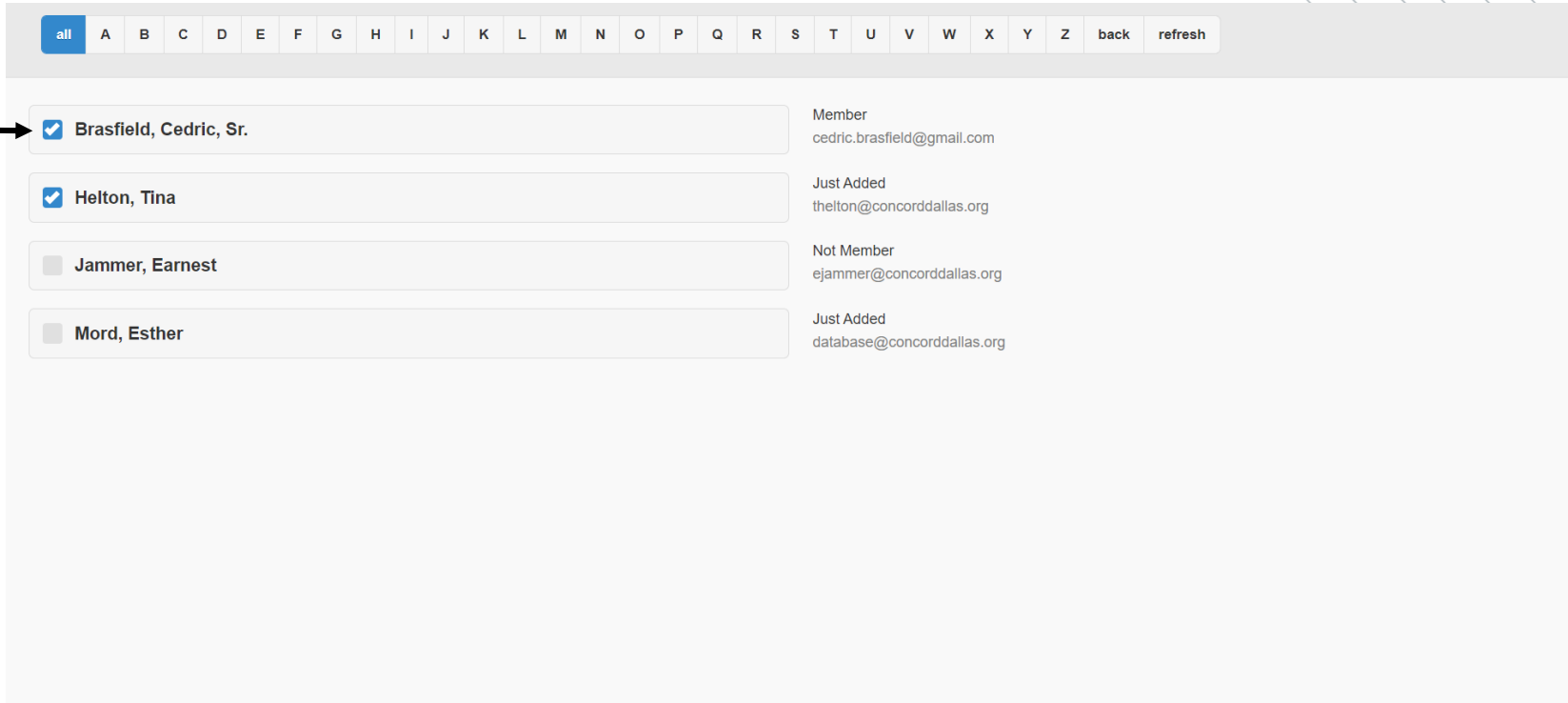


18

You will be taken to a simplified attendance screen for iPad and iPhone.

Taking Attendance – Via Desktop

19



The screenshot shows a desktop interface for taking attendance. At the top, there is a navigation bar with a dropdown menu currently set to 'all'. The dropdown menu lists letters from A to Z, along with 'back' and 'refresh' buttons. Below the navigation bar is a list of four members, each with a checkbox and their name. The first two members, Brasfield, Cedric, Sr. and Helton, Tina, have their checkboxes checked. The last two, Jammer, Earnest and Mord, Esther, have their checkboxes unchecked. To the right of each name is their status and email address.

Member Name	Status	Email
Brasfield, Cedric, Sr.	Member	cedric.brasfield@gmail.com
Helton, Tina	Just Added	thelton@concorddallas.org
Jammer, Earnest	Not Member	ejammer@concorddallas.org
Mord, Esther	Just Added	database@concorddallas.org



19

Similar to the default attendance screen, click on the checkboxes next to a person's name to record them as attended.



TouchPoint Software
User Experience Storyboard:
Sending Emails – Simple Emails

Sending Emails – Simple Emails

CONCORD CHURCH

John Baptist

6808 Pastor Bailey Dr, Dallas, TX
database@concorddallas.org

Primary Adult No Campus Just Added NMT-S1 Is Leader

Personal Involvement Profile Ministry Giving Communications

General

Title First Name Middle Name Suffix Last Name
Goes By Alt Name Former Name Gender
Marital Status Birthday Wedding Date Deceased Date

Communication

Primary Email Alt Email
database@concorddallas.org



1

After Logging In, click on the “Involvement” Tab.

Sending Emails – Simple Emails

The screenshot shows the member profile for John Baptist. The 'Involvement' tab is active, and the 'Current' sub-tab is highlighted in blue. The profile includes contact information, a list of family members, and a table of involvement records.

CONCORD CHURCH

John Baptist
6808 Pastor Bailey Dr, Dallas, TX
database@concorddallas.org

Primary Adult No Campus Just Added NMT-S1 Is Leader

Personal Involvement Profile Ministry Giving Communications

Current Previous Pending Attendance Registrations

Family Members
John Baptist
26 • Just Added • Head
database@concordd...

Related Families
Family Photo

Show 10 rows of types

Involvement	Leader	Enroll Date	MemberType	AttendPct
▶ F1 Groups and Lists 2017 - 2020				
Baptism Classes	Esther Mord	3/9/2021	Leader	100.0

Showing 1 of 1 records

Concord Church (214) 331-8522 concordtouchpointadmin@concorddallas.org

https://concorddallas.tpsdb.com/Person2/94939#enrollment © 2021 TouchPoint Software, Inc.

2



2

In the Involvement Tab, click on “Current” and make sure it turns Blue.

Sending Emails – Simple Emails

CONCORD CHURCH

John Baptist

6808 Pastor Bailey Dr, Dallas, TX
database@concorddallas.org

Primary Adult No Campus Just Added NMT-S1 Is Leader

Personal Involvement Profile Ministry Giving Communications

Current Previous Pending Attendance Registrations

Show 10 rows of types

Involvement	Leader	Enroll Date	MemberType	AttendPct
▶ F1 Groups and Lists 2017 - 2020				
▶ Baptism Classes	Esther Mord	3/9/2021	Leader	100.0

Showing 1 of 1 records

Concord Church (214) 331-8522 concordtouchpointadmin@concorddallas.org

https://concorddallas.tpsdb.com/Person2/94939#enrollment

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3

3

Look for the group that you want to send emails to. Once found, click on the “Name” of the group.



Sending Emails – Simple Emails

Quick Note*

The screenshot shows the member profile for John Baptist at Concord Church. The profile includes contact information, tabs for Personal, Involvement, Profile, Ministry, Giving, and Communications, and a table of involvement records. A circled '3*' points to the 'Leader' role in the 'MemberType' column of the table.

Involvement	Leader	Enroll Date	MemberType	AttendPct
F1 Groups and Lists 2017 - 2020				
Baptism Classes	Esther Mord	3/9/2021	Leader	100.0



3*

You will only be able to enter your group's page if you are a "Leader" within the group.

If you do not see the word, "Leader" under "MemberType" please contact the person responsible for your group at Concord. Tell them that you need to be a leader in your TouchPoint group.

Sending Emails – Simple Emails

4

CONCORD CHURCH

John Baptist, Esther Mord

F1 Groups and Lists 2017 - 2020 Main Campus Active Main Fellowship

Baptism Classes

People Meetings Settings Registration

6 Members Previous Inactive Pending Prospects Guests Options

name Filter Person Clear

Show 10 rows

<input type="checkbox"/>	Name	MemberType	Church	Communication	% Att.	Dates	Actions
<input type="checkbox"/>	John Baptist	Leader	Just Added	database@concorddallas.org	100.0%	Last 3/9/21 2 Joined 3/9/21 2	
<input type="checkbox"/>	Cedric Brasfield, Sr.	Member	Member	C (816) 305-8621 H (816) 305-8621 W (214) 467-6762 cedric.brasfield@gmail.com	100.0%	Last 3/8/21 2 Joined 3/8/21 3	
<input type="checkbox"/>	Tina Helton	Member	Just Added	C (469) 693-9020 thelton@concorddallas.org	100.0%	Last 3/9/21 2 Joined 3/8/21 3	
<input type="checkbox"/>	Earnest Jammer	Member	Not Member	C (214) 850-5228 H (214) 850-5228 earnestjammer@concorddallas.org		Joined 3/8/21 2	



4

Once in your Group, Navigate to the People Tab.

Sending Emails – Simple Emails

5

CONCORD CHURCH

John Baptist, Esther Mord

F1 Groups and Lists 2017 - 2020 Main Campus Active Main Fellowship

People Meetings Settings Registration

6 Members Previous Inactive Pending Prospects Guests Options

name Filter Person Clear

Show 10 rows

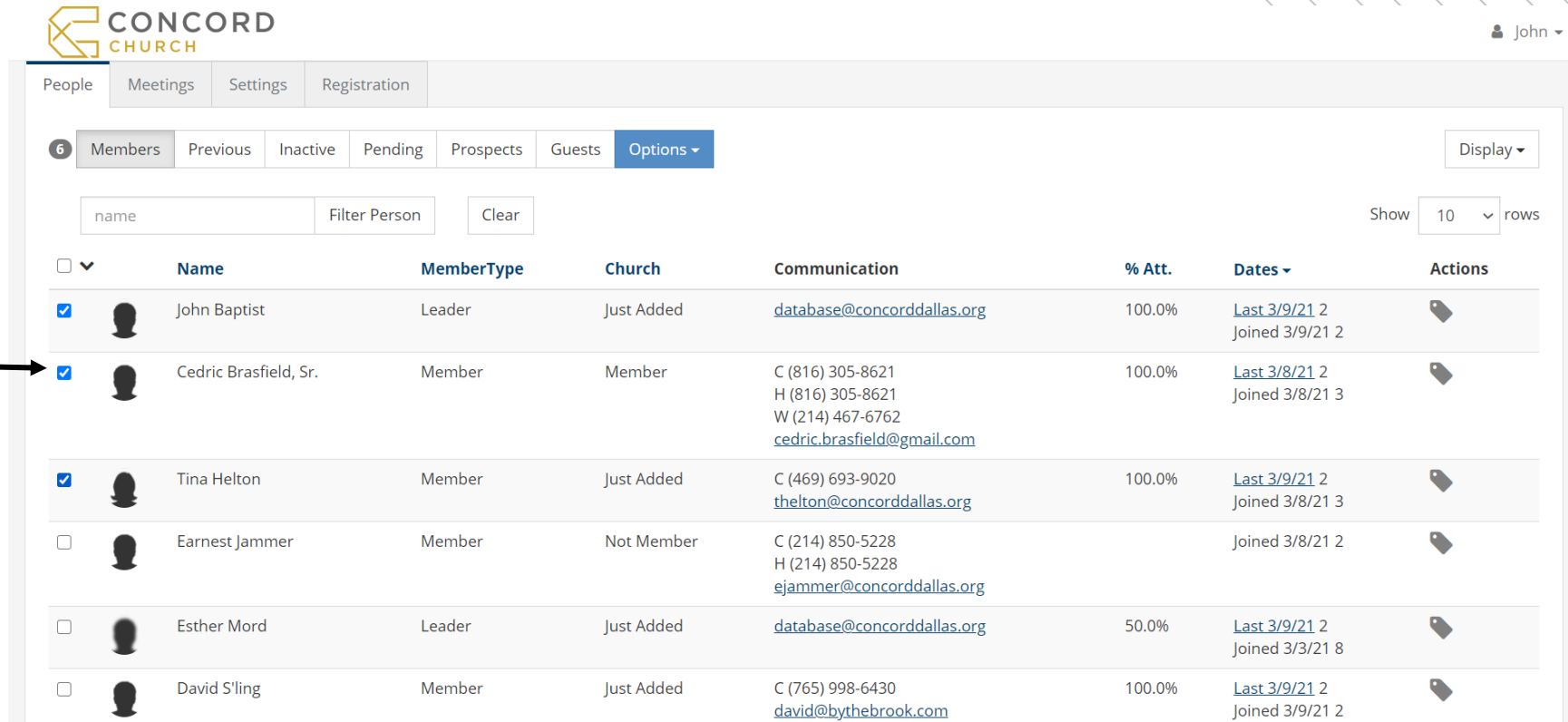
<input type="checkbox"/>	Name	MemberType	Church	Communication	% Att.	Dates	Actions
<input type="checkbox"/>	John Baptist	Leader	Just Added	database@concorddallas.org	100.0%	Last 3/9/21 2 Joined 3/9/21 2	
<input type="checkbox"/>	Cedric Brasfield, Sr.	Member	Member	C (816) 305-8621 H (816) 305-8621 W (214) 467-6762 cedric.brasfield@gmail.com	100.0%	Last 3/8/21 2 Joined 3/8/21 3	
<input type="checkbox"/>	Tina Helton	Member	Just Added	C (469) 693-9020 thelton@concorddallas.org	100.0%	Last 3/9/21 2 Joined 3/8/21 3	
<input type="checkbox"/>	Earnest Jammer	Member	Not Member	C (214) 850-5228 H (214) 850-5228 ejammer@concorddallas.org		Joined 3/8/21 2	



5

Click on the “Members” Sub-Tab.
Ensure that the individuals you want email, are viewable on the screen.

Sending Emails – Simple Emails



The screenshot shows the 'CONCORD CHURCH' People management interface. The 'People' tab is active, and the 'Members' sub-tab is selected. A search bar with 'name' and 'Filter Person' is visible. The table below lists members with columns for Name, MemberType, Church, Communication, % Att., Dates, and Actions. A circled '6' with an arrow points to the checkboxes in the first column of the table.

<input type="checkbox"/>	Name	MemberType	Church	Communication	% Att.	Dates	Actions
<input checked="" type="checkbox"/>	John Baptist	Leader	Just Added	database@concorddallas.org	100.0%	Last 3/9/21 2 Joined 3/9/21 2	
<input checked="" type="checkbox"/>	Cedric Brasfield, Sr.	Member	Member	C (816) 305-8621 H (816) 305-8621 W (214) 467-6762 cedric.brasfield@gmail.com	100.0%	Last 3/8/21 2 Joined 3/8/21 3	
<input checked="" type="checkbox"/>	Tina Helton	Member	Just Added	C (469) 693-9020 thelton@concorddallas.org	100.0%	Last 3/9/21 2 Joined 3/8/21 3	
<input type="checkbox"/>	Earnest Jammer	Member	Not Member	C (214) 850-5228 H (214) 850-5228 ejammer@concorddallas.org		Joined 3/8/21 2	
<input type="checkbox"/>	Esther Mord	Leader	Just Added	database@concorddallas.org	50.0%	Last 3/9/21 2 Joined 3/3/21 8	
<input type="checkbox"/>	David S'ling	Member	Just Added	C (765) 998-6430 david@bythebrook.com	100.0%	Last 3/9/21 2 Joined 3/9/21 2	

6



6

If you only want to select certain individuals for the email, click the checkbox next to the person's name.

Sending Emails – Simple Emails

7

CONCORD CHURCH

John Baptist, Esther Ward

F1 Groups and Lists 2017 - 2020 Main Campus Active Main Fellowship

Baptism Classes

People Meetings Settings Registration

Members Previous Inactive Pending Prospects Guests Options

name Filter Person Clear

<input type="checkbox"/>	Name	MemberType	Church	Communication	% Att.
<input checked="" type="checkbox"/>	John Baptist	Leader	Just Added	database@concorddallas.org	100.0%
<input checked="" type="checkbox"/>	Cedric Brasfield, Sr.	Member	Member	C (816) 305-8621 H (816) 305-8621 W (214) 467-6762 cedric.brasfield@gmail.com	100.0%
<input checked="" type="checkbox"/>	Tina Helton	Member	Just Added	C (469) 693-9020 thelton@concorddallas.org	100.0%
<input type="checkbox"/>	Earnest Jammer	Member	Not Member	C (214) 850-5228 H (214) 850-5228 jammer@concorddallas.org	

https://concorddallas.tpsdb.com/Email/01399607-f55e-4bf7-98a0-eba39b8c285e

John

Email

- Individuals
- All Current Members
- Parents
- Child with Parents CC'd
- Single Email Addresses
- Create/Edit Saved Draft

SMS

- Send Text



7

Once your individuals have been selected, click on the “Mail Button” on the blue toolbar.

Sending Emails – Simple Emails

8

CONCORD CHURCH

John Baptist, Esther Mord

F1 Groups and ... 2017 - 2020 Main Campus Active Main Fellowship

People Meetings Settings Registration

6 Members Previous Inactive Pending Prospects Guests Options

name Filter Person Clear

<input type="checkbox"/>	Name	MemberType	Church	Communication	% Att.
<input checked="" type="checkbox"/>	John Baptist	Leader	Just Added	database@concorddallas.org	100.0%
<input checked="" type="checkbox"/>	Cedric Brasfield, Sr.	Member	Member	C (816) 305-8621 H (816) 305-8621 W (214) 467-6762 cedric.brasfield@gmail.com	100.0%
<input checked="" type="checkbox"/>	Tina Helton	Member	Just Added	C (469) 693-9020 thelton@concorddallas.org	100.0% Last 3/9/21 2 Joined 3/8/21 3
<input type="checkbox"/>	Earnest Jammer	Member	Not Member	C (214) 850-5228 H (214) 850-5228 jammer@concorddallas.org	Joined 3/8/21 2

https://concorddallas.tpsdb.com/Email/01399607-f55e-4bf7-98a0-eba39b8c285e

Click on your intended email recipients.*

We recommend:

8

- Individuals – Sends an email to every **person** you selected.
- Single Email Addresses – Sends an email to every **email address** you selected.



* See the [Table of Email Types](#).

Sending Emails – Simple Emails

9

The screenshot shows the 'Select Template' interface in the Concord Church email system. At the top left is the 'CONCORD CHURCH' logo. In the top right corner, the name 'John' is displayed with a dropdown arrow. Below the header, the 'Select Template' title is centered. A navigation bar contains four tabs: 'Email Templates', 'My Drafts', 'Team Drafts', and 'Shared'. The 'Email Templates' tab is active and highlighted. Below the tabs, five email templates are displayed as cards: 'Empty Template', 'Basic Template', 'Basic Template - Mobile Responsive', and 'ForgotPasswordReset'. The 'Empty Template' card is selected, and a black arrow points from the circled number '9' to it. The footer of the interface includes contact information for Concord Church: '(214) 331-8522' and 'concordtouchpointadmin@concorddallas.org'. It also features the 'POWERED BY TouchPoint' logo and a copyright notice: '© 2021 TouchPoint Software, Inc.'.



9

Select a Template to begin writing your email. For simple emails, click “Empty Template.” Depending on our mandates at the time, different templates will be available for your use.

Sending Emails – Simple Emails

CONCORD CHURCH John ▾

Compose Email

Please Note: Your recipient list has been saved in a tag, so you can run queries in other tabs. But you should not compose two emails simultaneously as one will overwrite the other. ✕

From: J.B. Baptist ▾

To: Cedric Brasfield, Sr. (52834) Earnest Jammer (77559) Esther Mord (94938)
J.B. Baptist (94939) Tina Helton (96405) David S'ling (96456) +

6 people .

Subject: |

Add Cc/Reply-To?

[Click here to edit content](#)
[Click here to {unsubscribe} from emails from this sender.](#)

10

10 In the “From” field, indicate who will be sending the email. Replies will be sent to the email address listed on file for the sender.*

*Contact us at database@concorddallas.org and ask about “Email Delegations” for info on how to email on the behalf of another person.



Sending Emails – Simple Emails

CONCORD CHURCH

John ▾

Compose Email

Please Note: Your recipient list has been saved in a tag, so you can run queries in other tabs. But you should not compose two emails simultaneously as one will overwrite the other. ✕

From: J.B. Baptist ▾

To: Cedric Brasfield, Sr. (52834) Earnest Jammer (77559) Esther Mord (94938)
J.B. Baptist (94939) Tina Helton (96405) David S'ling (96456) +

6 people .

Subject: |

Add Cc/Reply-To?

[Click here to edit content](#)
[Click here to {unsubscribe} from emails from this sender.](#)



11

In the “To” field, you will see the people you are emailing. If you need to add more, you can click the “+” button.

Sending Emails – Simple Emails

CONCORD CHURCH John ▾

From: J.B. Baptist ▾

To: Cedric Brasfield, Sr. (52834) Earnest Jammer (77559) Esther Mord (94938)
J.B. Baptist (94939) Tina Helton (96405) David S'ling (96456)
6 people.

Subject: Baptism Classes Update

Add Cc/Reply-To?

[Click here to edit content](#)
[Click here to {unsubscribe} from emails from this sender.](#)

12

Subject: Baptism Classes Update

Add Cc/Reply-To?

[Click here to edit content](#)

[Click here to {unsubscribe} from emails from this sender.](#)



12

Type in your email's subject line into the "Subject" field.

Sending Emails – Simple Emails

CONCORD CHURCH

John ▾

From: J.B. Baptist ▾

To: Cedric Brasfield, Sr. (52834) Earnest Jammer (77559) Esther Mord (94938)
J.B. Baptist (94939) Tina Helton (96405) David S'ling (96456)

6 people .

Cc/Reply-To:

Use commas to separate addresses. Each address receives a copy of the email and each is added to the Reply-To field.

Subject: Baptism Classes Update

Add Cc/Reply-To?

[Click here to edit content](#)

[Click here to {unsubscribe} from emails from this sender.](#)

13



13

Check, “Add Cc/Reply-To” to add individuals to carbon copy.

Sending Emails – Simple Emails

CONCORD CHURCH

John ▾

From: J.B. Baptist ▾

To: Cedric Brasfield, Sr. (52834) Earnest Jammer (77559) Esther Mord (94938)
J.B. Baptist (94939) Tina Helton (96405) David S'ling (96456)
6 people .

Cc/Reply-To:

Use commas to separate addresses. Each address receives a copy of the email and each is added to the Reply-To field.

Subject: Baptism Classes Update

Add Cc/Reply-To?

[Click here to edit content](#)

[Click here to {unsubscribe} from emails from this sender.](#)

14

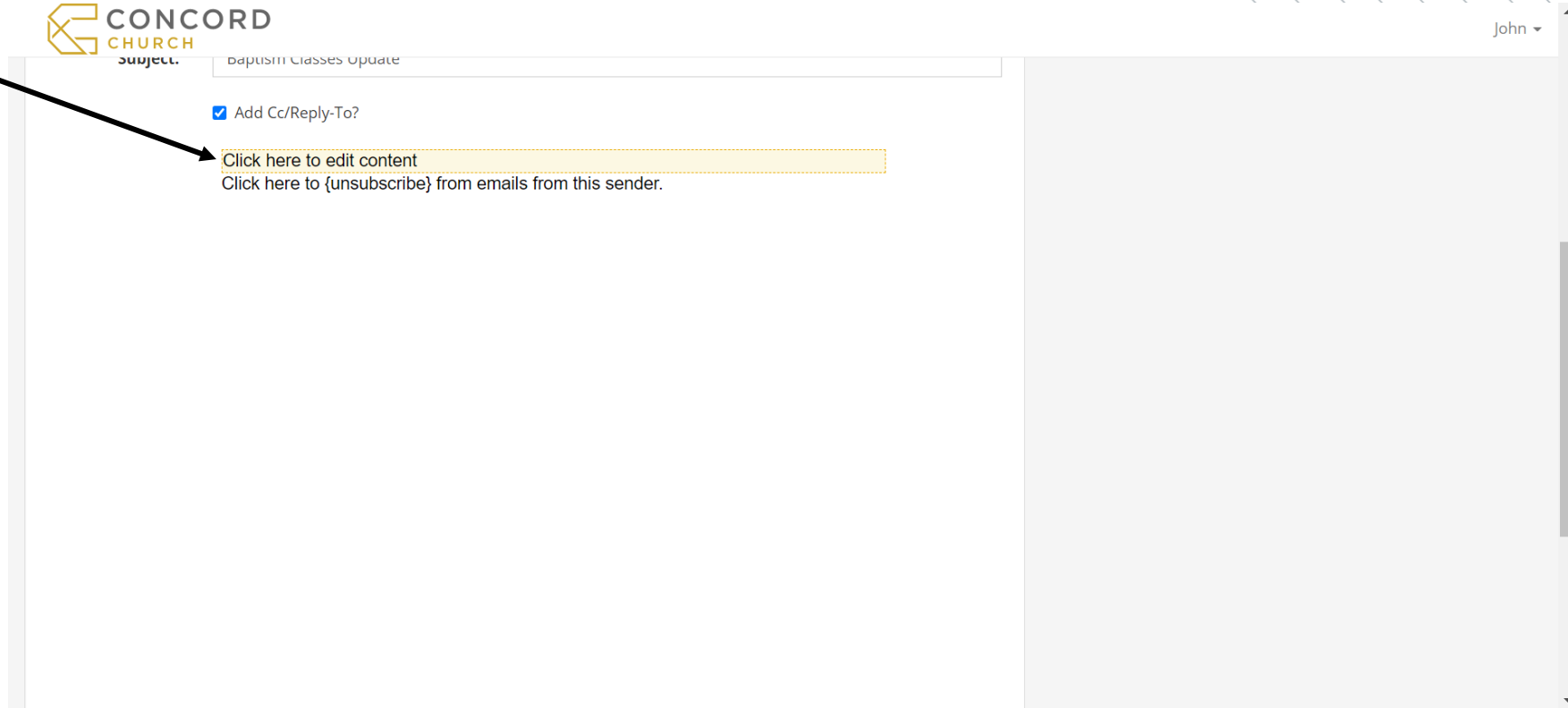


14

Type in the email addresses of those you want to CC, On the newly added CC/Reply to line.

Sending Emails – Simple Emails

15

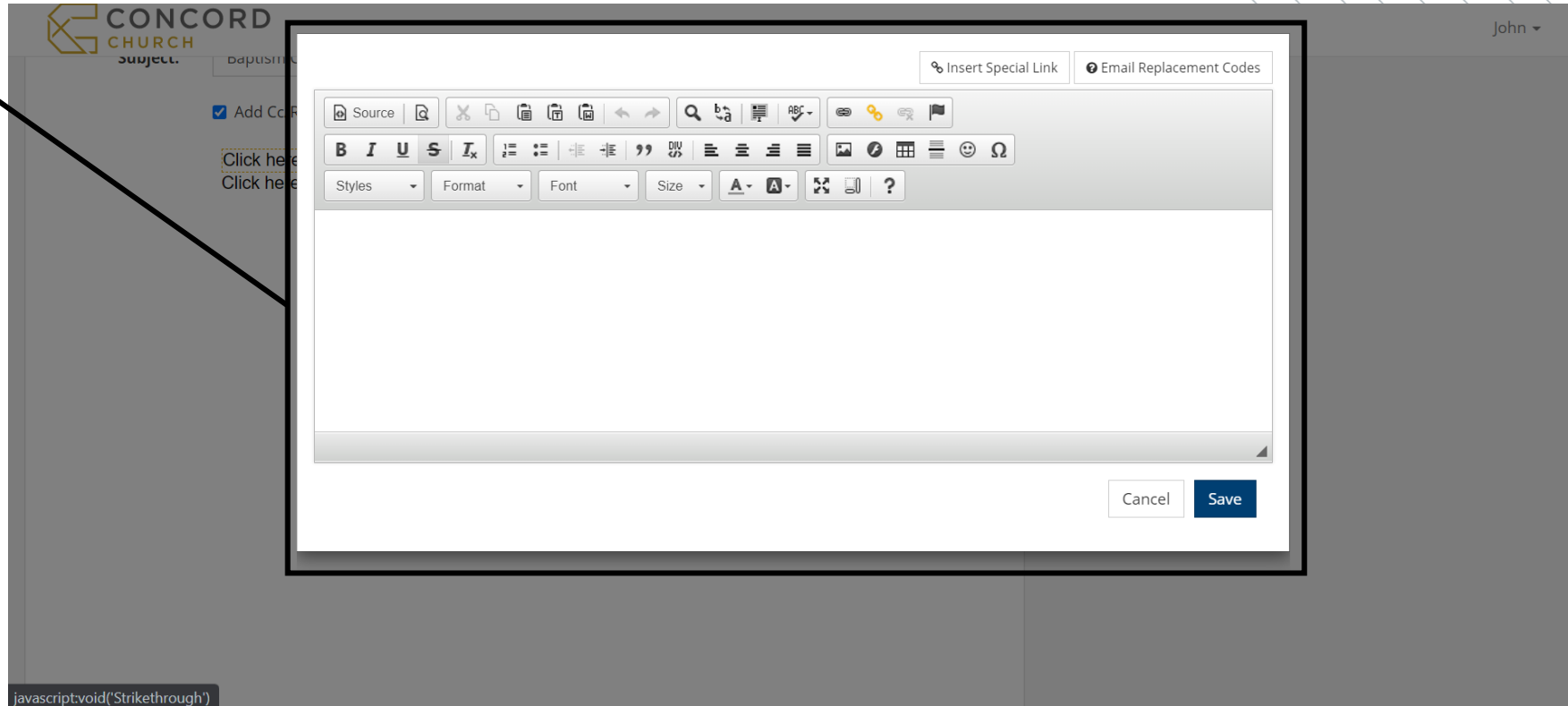


15

Click on the section, “Click here to edit content” to begin crafting your email.

Sending Emails – Simple Emails

16

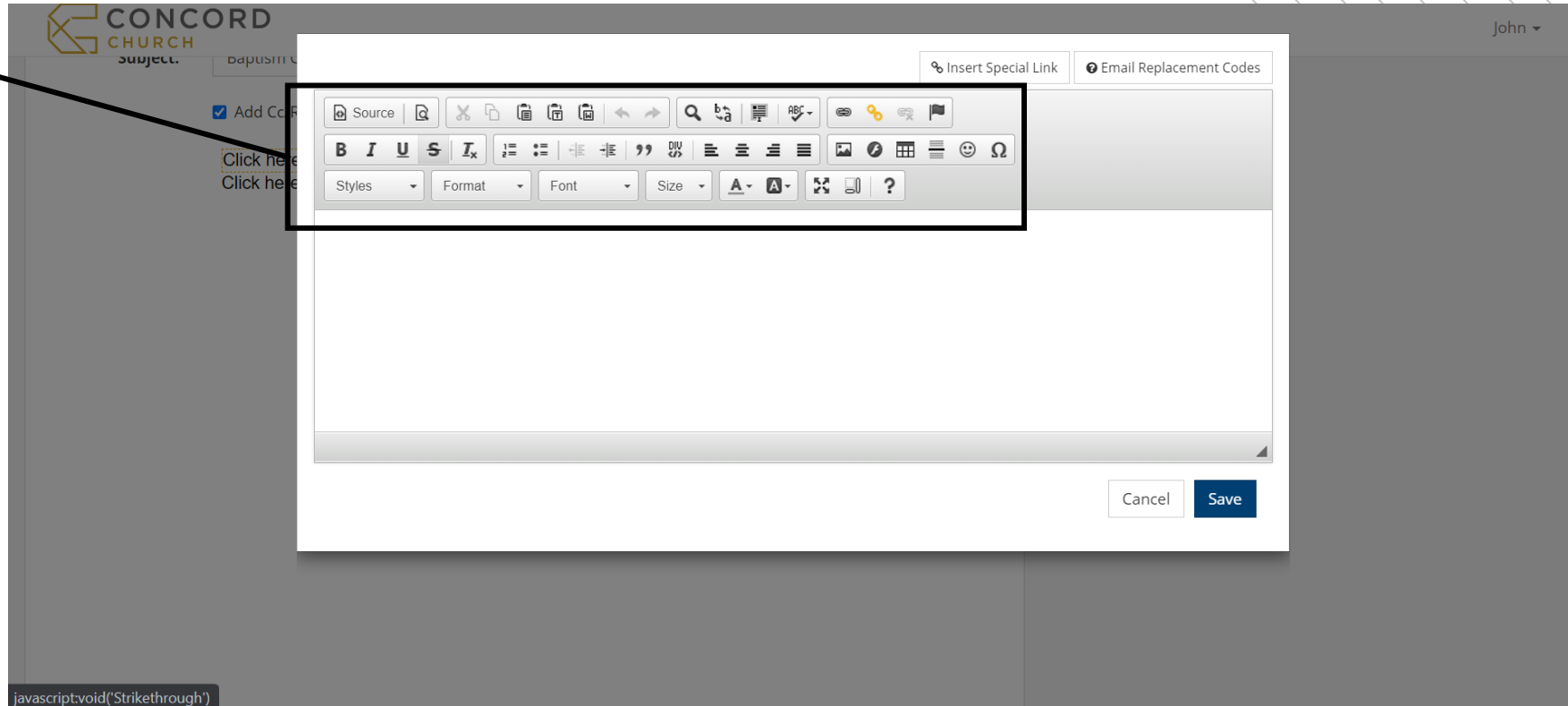


16

You will be shown a Text Editor (similar to Fellowship One.)

Sending Emails – Simple Emails

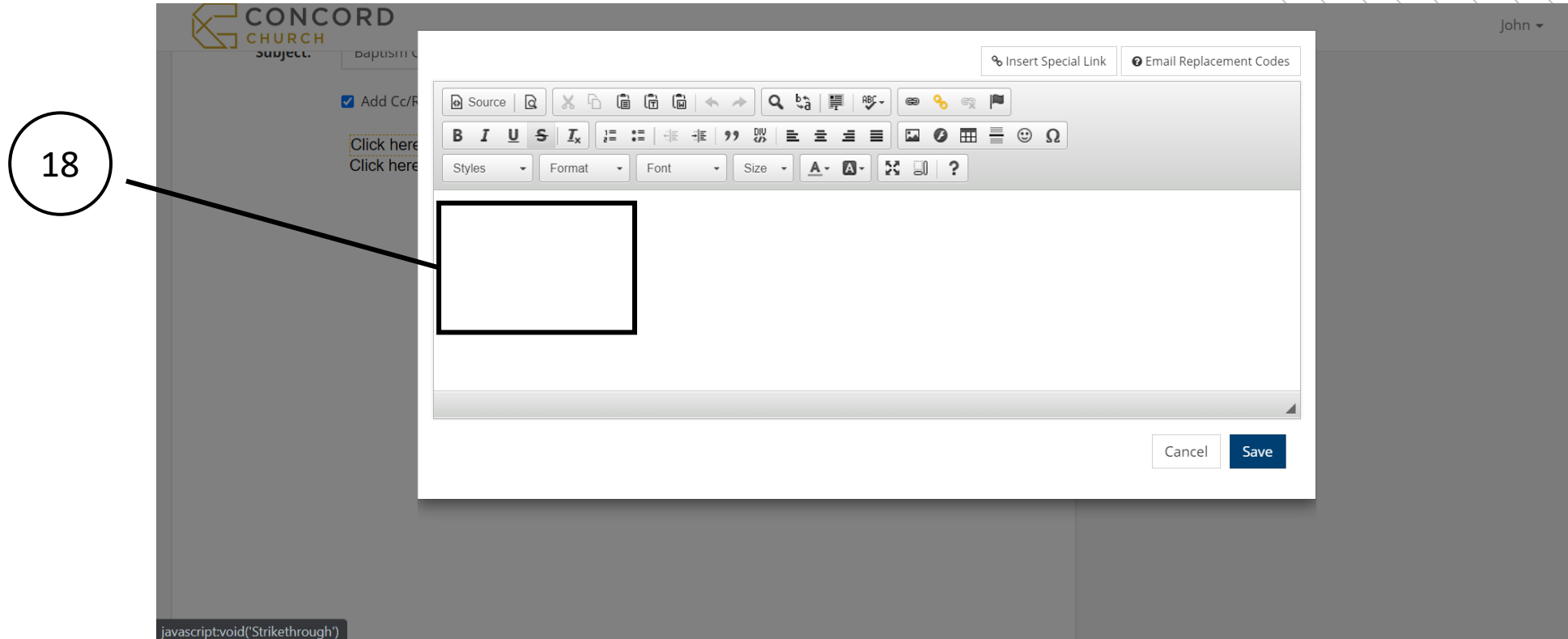
17



17

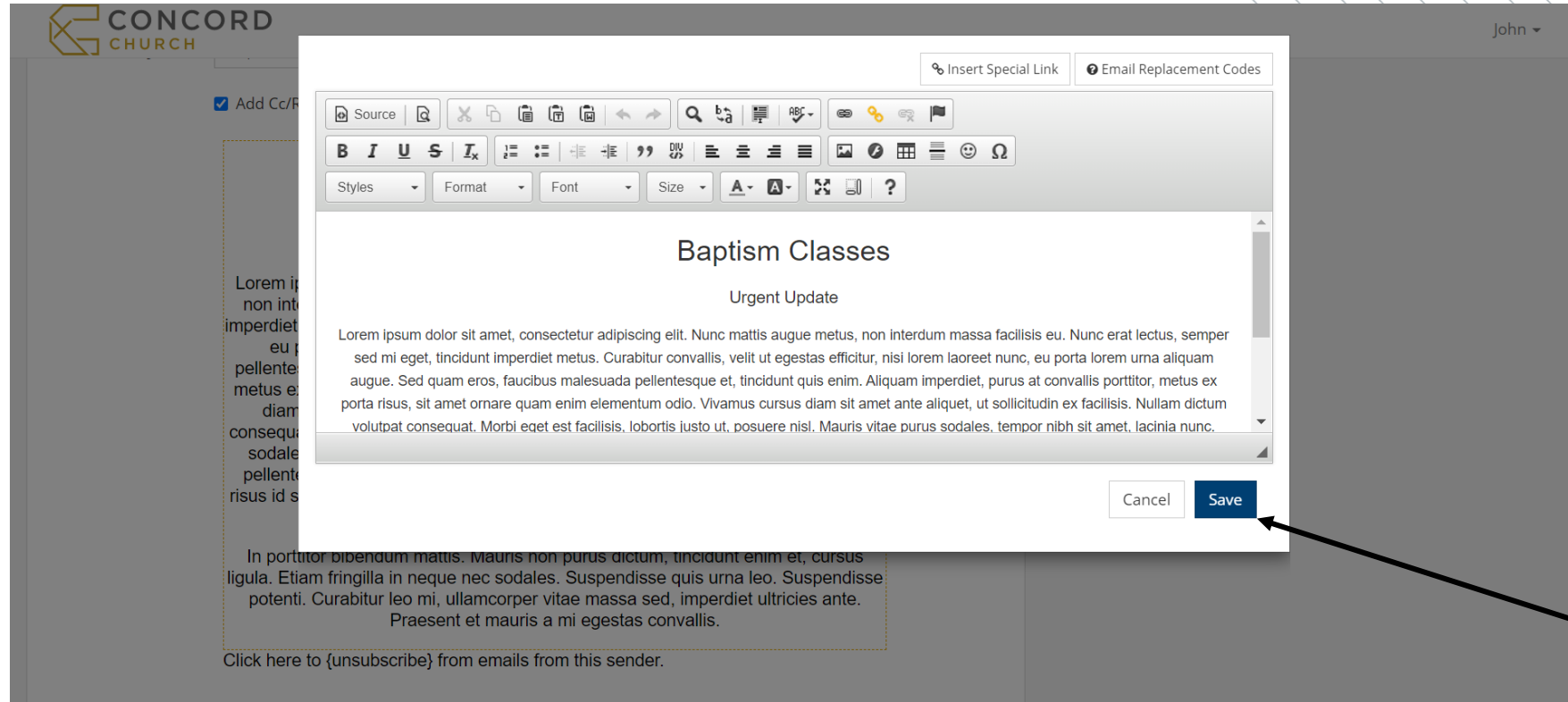
Buttons for adding formatting, links and images will be at the top. Hover your mouse over a button without clicking it to be shown a description of the button's use.

Sending Emails – Simple Emails



18 Click in the white section below to add text.

Sending Emails – Simple Emails



CONCORD CHURCH

John

Insert Special Link Email Replacement Codes

Source

B *I* U ~~S~~ *I*_x

Styles Format Font Size

Baptism Classes

Urgent Update

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc mattis augue metus, non interdum massa facilisis eu. Nunc erat lectus, semper sed mi eget, tincidunt imperdiet metus. Curabitur convallis, velit ut egestas efficitur, nisi lorem laoreet nunc, eu porta lorem urna aliquam augue. Sed quam eros, faucibus malesuada pellentesque et, tincidunt quis enim. Aliquam imperdiet, purus at convallis porttitor, metus ex porta risus, sit amet ornare quam enim elementum odio. Vivamus cursus diam sit amet ante aliquet, ut sollicitudin ex facilisis. Nullam dictum volutpat consequat. Morbi eget est facilisis, lobortis justo ut, posuere nisl. Mauris vitae purus sodales, tempor nibh sit amet, lacinia nunc.

Cancel Save

Click here to {unsubscribe} from emails from this sender.

19

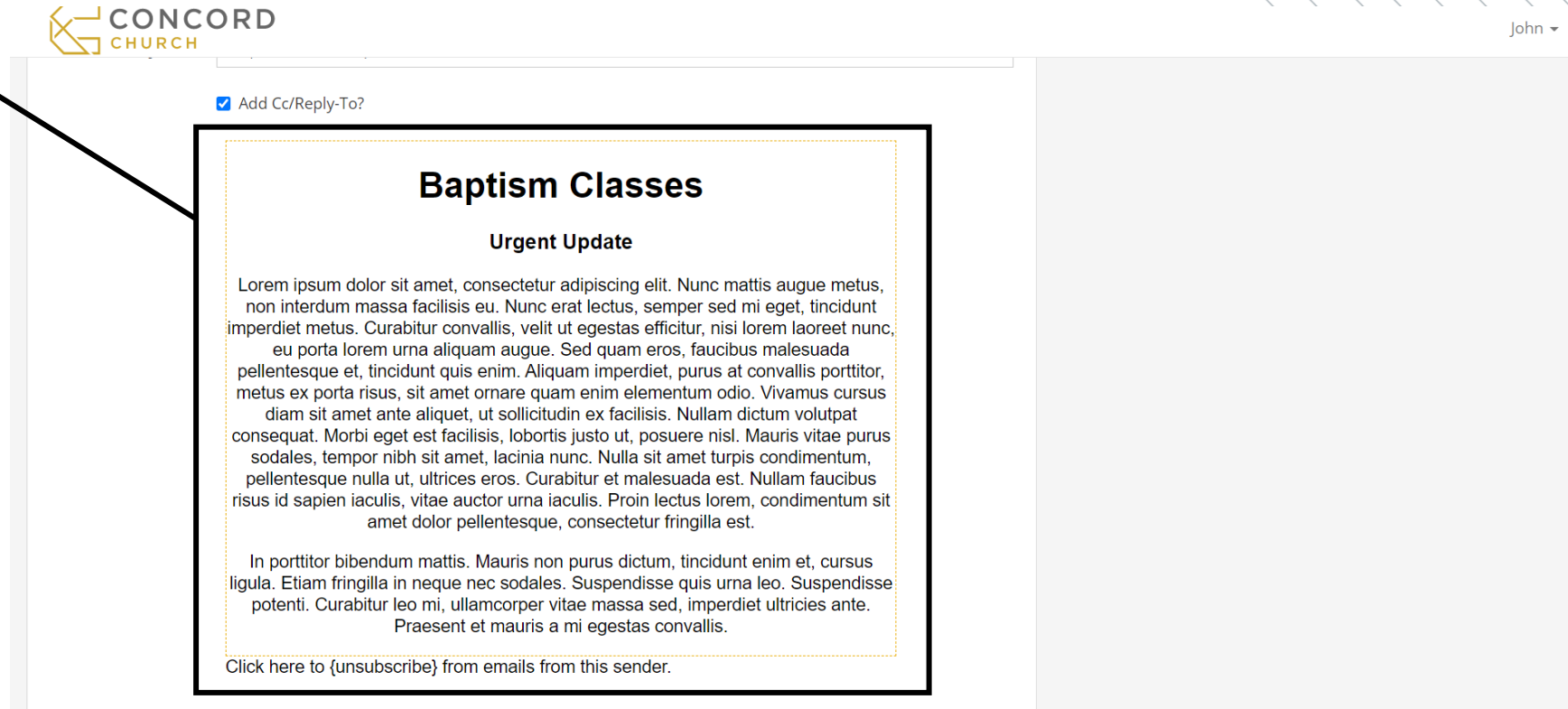


19

Once you have entered your text and crafted your email, click “Save.”

Sending Emails – Simple Emails

20



20

When saved correctly, a preview of your email will appear on screen.

Sending Emails – Simple Emails

CONCORD CHURCH

John ▾

consequat. Morbi eget est facilisis, lobortis justo ut, posuere nisl. Mauris vitae purus sodales, tempor nibh sit amet, lacinia nunc. Nulla sit amet turpis condimentum, pellentesque nulla ut, ultrices eros. Curabitur et malesuada est. Nullam faucibus risus id sapien iaculis, vitae auctor urna iaculis. Proin lectus lorem, condimentum sit amet dolor pellentesque, consectetur fringilla est.

In porttitor bibendum mattis. Mauris non purus dictum, tincidunt enim et, cursus ligula. Etiam fringilla in neque nec sodales. Suspendisse quis urna leo. Suspendisse potenti. Curabitur leo mi, ullamcorper vitae massa sed, imperdiet ultricies ante. Praesent et mauris a mi egestas convallis.

[Click here to {unsubscribe} from emails from this sender.](#)

Recover Save As Draft Send Test Email (To Me) **Send**

Concord Church ☎ (214) 331-8522 ✉ concordtouchpointadmin@concorddallas.org

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21

Click “Send” to send the email to your selected individuals.

Sending Emails – Simple Emails

CONCORD CHURCH

John ▾

consequat. Morbi eget est facilisis, lobortis justo ut, posuere nisl. Mauris vitae purus sodales, tempor nibh sit amet, lacinia nunc. Nulla sit amet turpis condimentum, pellentesque nulla ut, ultrices eros. Curabitur et malesuada est. Nullam faucibus risus id sapien iaculis, vitae auctor urna iaculis. Proin lectus lorem, condimentum sit amet dolor pellentesque, consectetur fringilla est.

In porttitor bibendum mattis. Mauris non purus dictum, tincidunt enim et, cursus ligula. Etiam fringilla in neque nec sodales. Suspendisse quis urna leo. Suspendisse potenti. Curabitur leo mi, ullamcorper vitae massa sed, imperdiet ultricies ante. Praesent et mauris a mi egestas convallis.

[Click here to {unsubscribe} from emails from this sender.](#)

Recover Save As Draft Send Test Email (To Me) Send

Concord Church ☎ (214) 331-8522 ✉ concordtouchpointadmin@concorddallas.org

POWERED BY TouchPoint
<https://concorddallas.tpsdb.com/Email/4b613260-d4cd-4fae-a6ba-d6e598b0f03a#>

© 2021 TouchPoint Software, Inc.

22



22

Click “Send Test Email” to send an email to yourself.

Sending Emails – Simple Emails

CONCORD CHURCH

John ▾

consequat. Morbi eget est facilisis, lobortis justo ut, posuere nisl. Mauris vitae purus sodales, tempor nibh sit amet, lacinia nunc. Nulla sit amet turpis condimentum, pellentesque nulla ut, ultrices eros. Curabitur et malesuada est. Nullam faucibus risus id sapien iaculis, vitae auctor urna iaculis. Proin lectus lorem, condimentum sit amet dolor pellentesque, consectetur fringilla est.

In porttitor bibendum mattis. Mauris non purus dictum, tincidunt enim et, cursus ligula. Etiam fringilla in neque nec sodales. Suspendisse quis urna leo. Suspendisse potenti. Curabitur leo mi, ullamcorper vitae massa sed, imperdiet ultricies ante. Praesent et mauris a mi egestas convallis.

Click here to {unsubscribe} from emails from this sender.

Recover Save As Draft Send Test Email (To Me) Send

Concord Church ☎ (214) 331-8522 ✉ concordtouchpointadmin@concorddallas.org

POWERED BY TouchPoint

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23



23

To save the email for later, click “Save as Draft.”

Sending Emails – Simple Emails

24

The screenshot shows the Concord Church email editor interface. At the top left is the Concord Church logo. The main content area contains placeholder text: "consequat. Morbi eget est facilisis, lobortis justo u sodales, tempor nibh sit amet, lacinia nunc. Nul pellentesque nulla ut, ultrices eros. Curabitur et rive id sapien iaculis, vitae auctor urna iaculis. Pr amet dolor pellentesque, conseqe". Below this is another paragraph: "In porttitor bibendum mattis. Mauris non purus d ligula. Etiam fringilla in neque nec sodales. Susper potenti. Curabitur leo mi, ullamcorper vitae mas Praesent et mauris a mi eges". At the bottom of the content area is a link: "Click here to {unsubscribe} from emails from this sender." A "Save Draft" dialog box is open in the center, with a "Draft Name" field containing the text "Baptism Update Draft". The dialog has "Cancel" and "Submit" buttons. At the bottom of the editor are buttons for "Recover", "Save As Draft", "Send Test Email (To Me)", and "Send". The footer contains contact information for Concord Church and is powered by TouchPoint software.



24

When Saving as a Draft, type in the name of the Draft in the menu that pops up.

Sending Emails – Simple Emails

25

CONCORD CHURCH

Compose Email

Please Note: Your recipient list has been saved in a tag, so you can run queries in other tabs. But you should not compose two emails simultaneously as one will overwrite the other.

From: J.B. Baptist

To: Cedric Brasfield, Sr. (52834) Earnest Jammer (77559) Esther Mord (94938)
J.B. Baptist (94939) Tina Helton (96405) David S'ling (96456)
6 people .

Subject: Baptism Classes Update

Add Cc/Reply-To?

Baptism Classes
Urgent Update

John

- Profile
- Change Password
- Open Person In New Tab
- Open Involvement In New Tab
- Log Out



25

Once the draft is submitted, you can go back to your group. Click on your Name in the top right corner of the screen.

Sending Emails – Simple Emails

26



Compose Email

Please Note: Your recipient list has been saved in a tag, so you can run queries in other tabs. But you should not compose two emails simultaneously as one will overwrite the other.

From: J.B. Baptist

To: Cedric Brasfield, Sr. (52834) Earnest Jammer (77559) Esther Mord (94938)
J.B. Baptist (94939) Tina Helton (96405) David S'ling (96456)
6 people .

Subject: Baptism Classes Update

Add Cc/Reply-To?

Baptism Classes
Urgent Update

<https://concorddallas.tpsdb.com/Person2/94939>

John

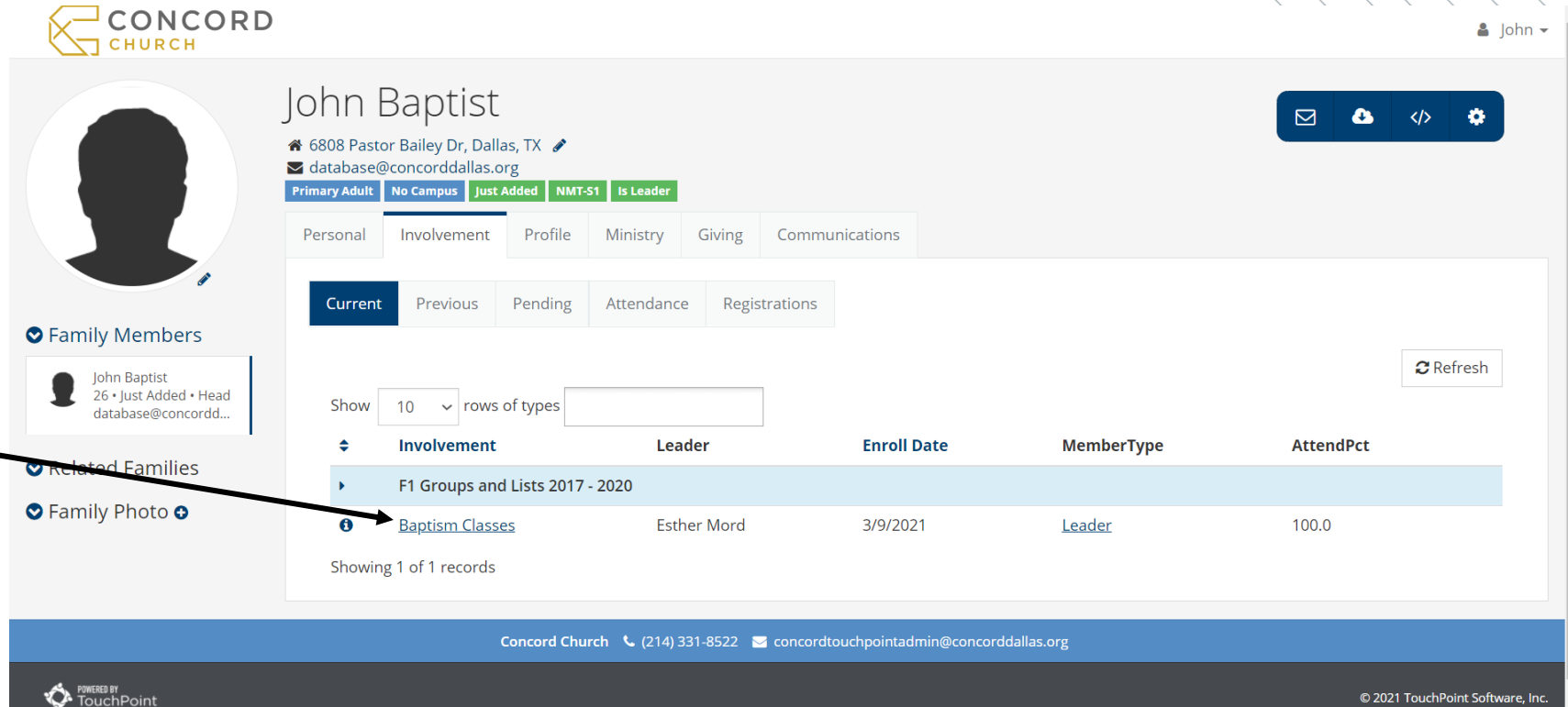
- Profile
- Change Password
- Open Person In New Tab
- Open Involvement In New Tab
- Log Out



26

Click "Profile" to return to your profile.

Sending Emails – Simple Emails



The screenshot shows the member profile for John Baptist. The 'Involvement' tab is selected, displaying a table of group memberships. A circled number '27' with an arrow points to the 'Baptism Classes' link in the table.

Involvement	Leader	Enroll Date	MemberType	AttendPct
F1 Groups and Lists 2017 - 2020				
Baptism Classes	Esther Mord	3/9/2021	Leader	100.0

27



27

On the Involvement Tab.
Click on your “Group Name” to re-enter the group.

Sending Emails – Simple Emails

28

The screenshot shows the Concord Church database interface. At the top left is the Concord Church logo. The main heading is "Baptism Classes" with a sub-heading "John Baptist, Esther Mord". Below this are tabs for "F1 Groups and Lists 2017 - 2020", "Main Campus", "Active", and "Main Fellowship". A toolbar at the top right contains an envelope icon, a cloud icon, and a gear icon. A dropdown menu is open from the envelope icon, showing options for "Email" (Individuals, All Current Members, Parents, Child with Parents CC'd, Single Email Addresses, Create/Edit Saved Draft) and "SMS" (Send Text). A table of members is visible below the toolbar. A circled number "28" has an arrow pointing to the "Create/Edit Saved Draft" option in the dropdown menu.

<input type="checkbox"/>	Name	MemberType	Church	Communication	% Att.
<input type="checkbox"/>	John Baptist	Leader	Just Added	database@concorddallas.org	100.0%
<input type="checkbox"/>	Cedric Brasfield, Sr.	Member	Member	C (816) 305-8621 H (816) 305-8621 W (214) 467-6762 cedric.brasfield@gmail.com	100.0%
<input type="checkbox"/>	Tina Helton	Member	Just Added	C (469) 693-9020 thelton@concorddallas.org	100.0%
<input type="checkbox"/>	Earnest Jammer	Member	Not Member	C (214) 850-5228 H (214) 850-5228	Joined 3/8/21 2



28

To edit your draft without selecting people to send it to, click the Mail button on the Blue Toolbar, and click “Create/Edit Saved Draft.”

Sending Emails – Simple Emails

CONCORD CHURCH

John ▾

Select Template

29 →

Email Templates My Drafts Team Drafts Shared

Empty Template Basic Template Basic Template - Mobile Responsive ForgotPasswordReset

Concord Church (214) 331-8522 concordtouchpointadmin@concorddallas.org

POWERED BY TouchPoint

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<https://concorddallas.tpsdb.com/Email/be81fde4-c38c-4c1c-9a3f-eafc30bc35ac#myDrafts>



29

Click the “My Drafts” tab to display your saved drafts.



Sending Emails – Simple Emails

 **CONCORD CHURCH** John ▾

Select Template

Email Templates My Drafts Team Drafts Shared

Name **Role** **Created Date** **Action** Delete 0 Draft(s)

<input type="checkbox"/>	Baptism Update Draft 		3/11/2021	<input type="button" value="Clone"/>
<input type="checkbox"/>	Baptism Update Draft		3/25/2021	<input type="button" value="Clone"/>
<input type="checkbox"/>	Draft #1 		3/14/2021	<input type="button" value="Clone"/>

30



30

Click the name of your draft to re-open it.

Table 1:Email Types

There are several different **Email Types** within the system.
A description of what each email type does is below:

Attend Credit	Description
Individuals	Sends an Email to every person on your list. (This means that if 2 people on your list share the same email address, they will receive 2 emails at that address.)
Parents	Sends an email to Primary Adults of the families in your list.
Child with Parent's CCd	Sends an email to the children in your list and copies both Primary Adults in their family.
All Current Members	Sends an email to all of the current members of your group.
Single Email Addresses	Sends an email to every <i>email address</i> on your list. (This means that if 2 people on your list share the same email address, they will receive 1 email at that address.) (Also disables Email Replacement (personalization) codes.)



TouchPoint Software
User Experience Storyboard:

Sending Emails – Simple Emails

Extra Lesson: Attaching Links

Sending Emails – Attaching Links

CONCORD CHURCH

John

Compose Email

Please Note: Your recipient list has been saved in a tag, so you can run queries in other tabs. But you should not compose two emails simultaneously as one will overwrite the other.

From: John Baptist

To: The Admin (1) Cedric Brasfield, Sr. (52834) Earnest Jammer (77559) Esther Mord (94938) John Baptist (94939) Tina Helton (96405) David S'ling (96456)
7 people .

Subject:

Add Cc/Reply-To?

[Click here to edit content](#)
[Click here to {unsubscribe} from emails from this sender.](#)

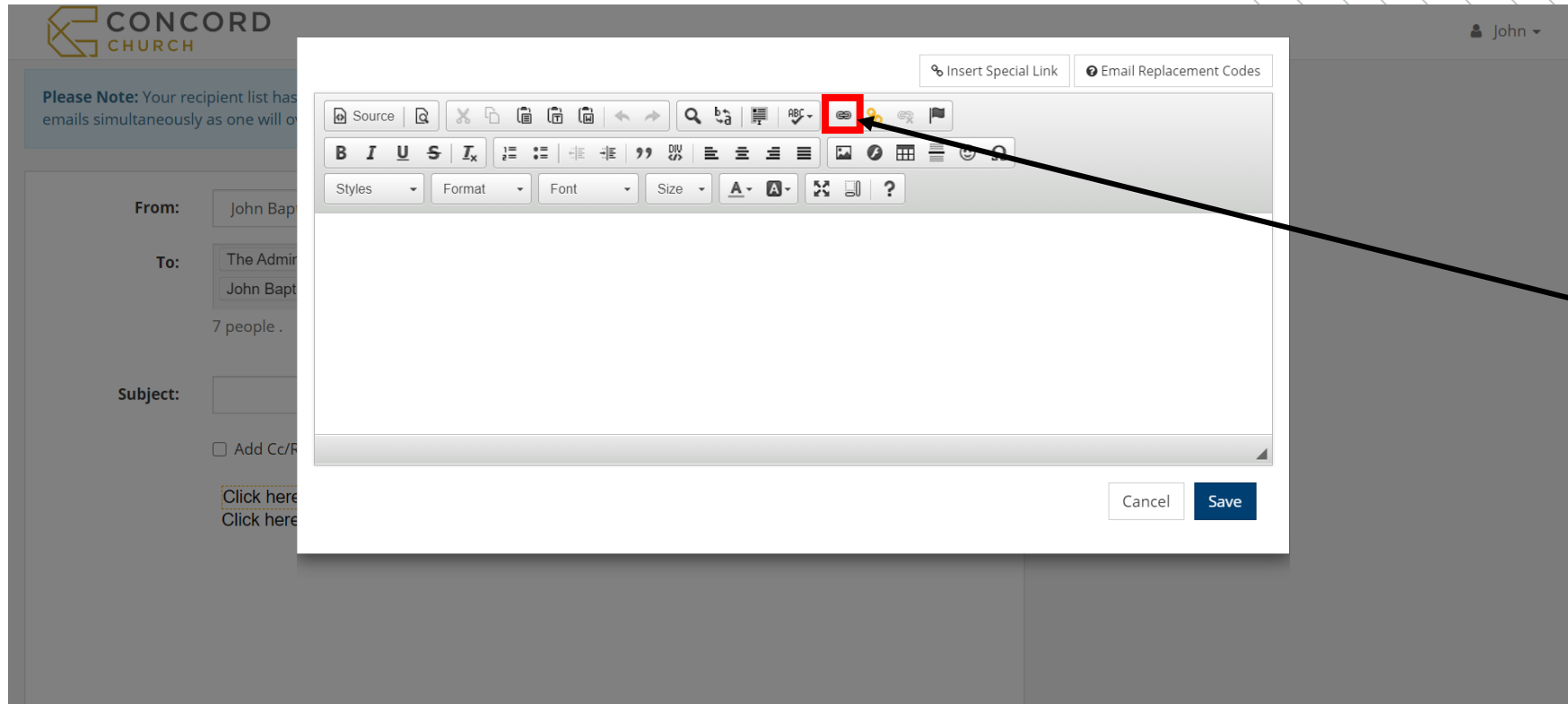
1



1

After you have set up the basics for your email, click on “Click here to edit content” to begin crafting the email.

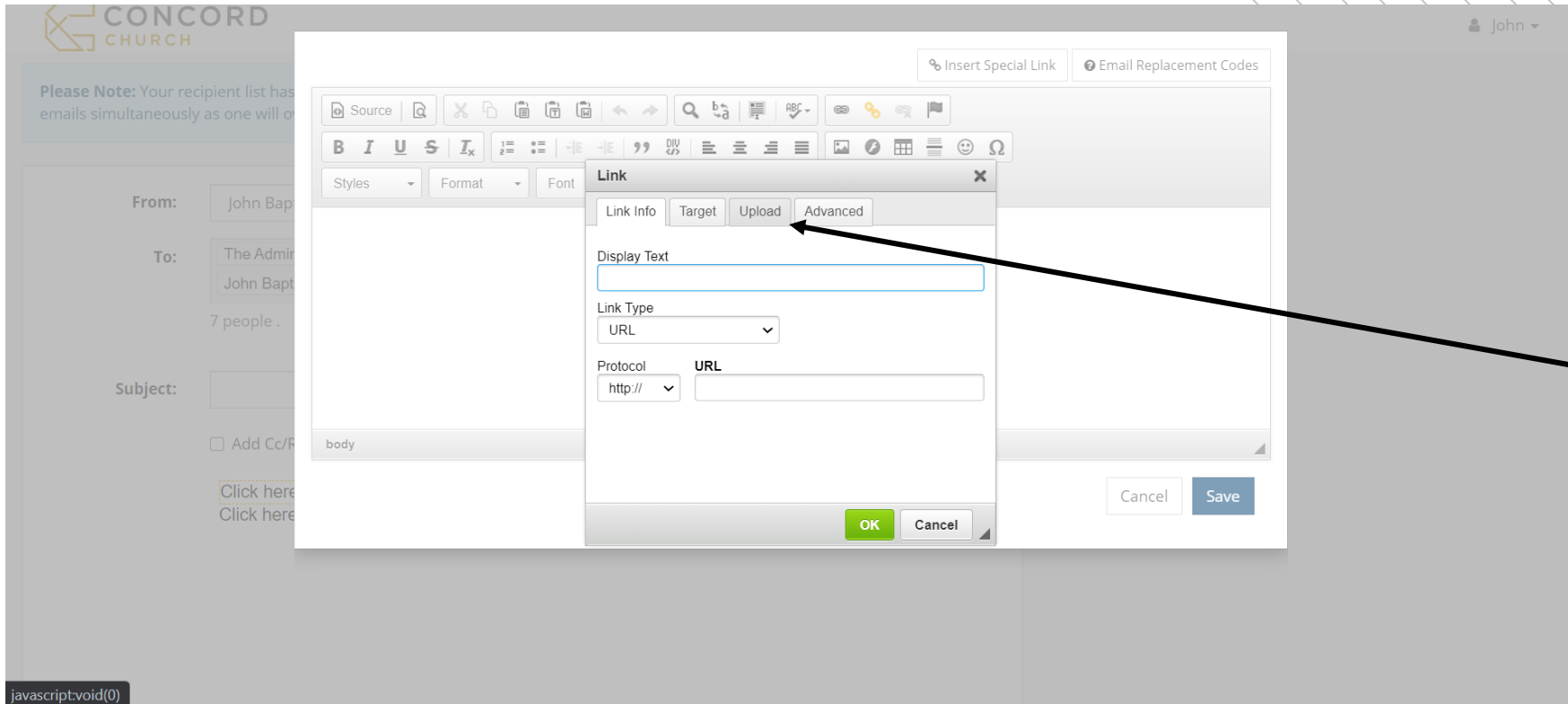
Sending Emails – Attaching Links



2

Within the email editor, Click on the “Add Link” button.

Sending Emails – Attaching Links

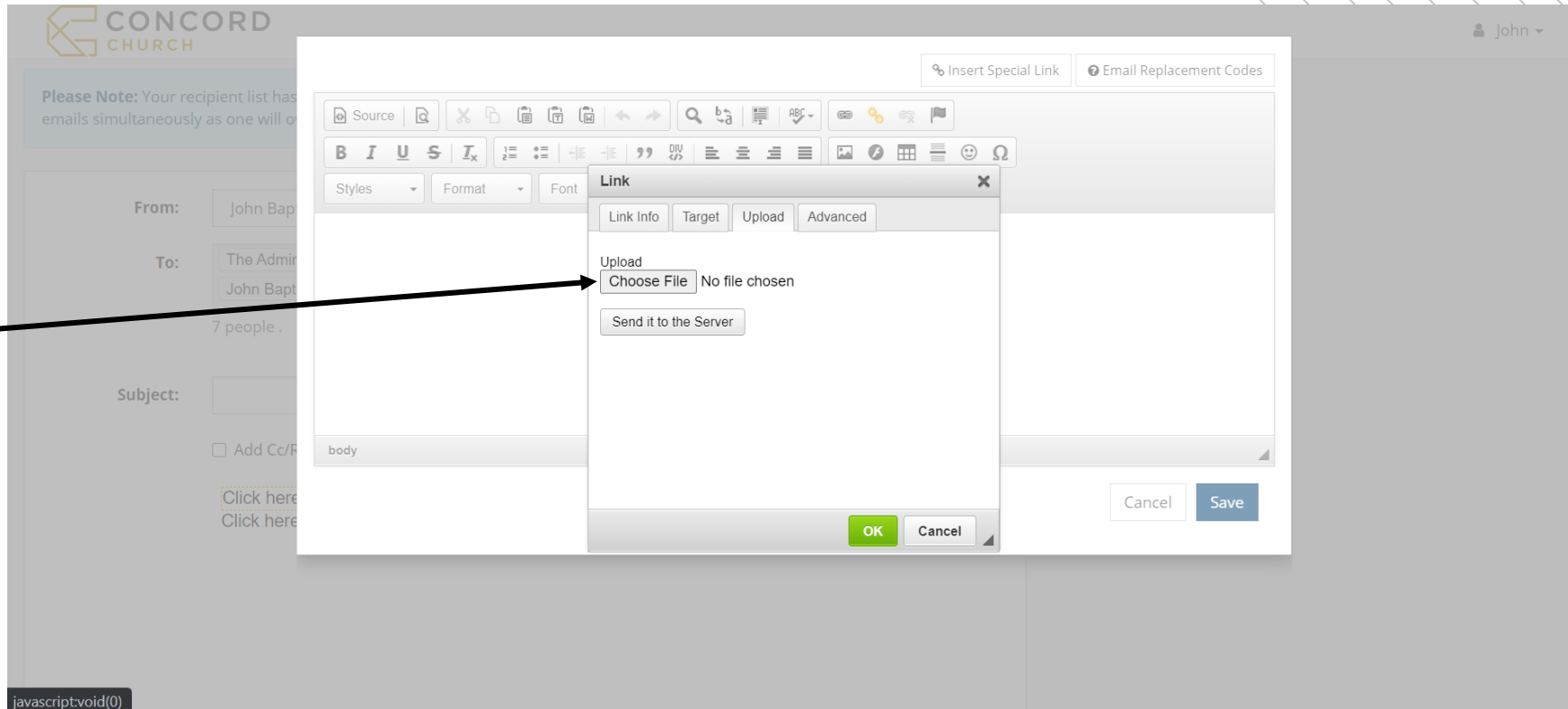


3

This will open the Link Menu.
Here, click on the “Upload Tab.”

Sending Emails – Attaching Links

4

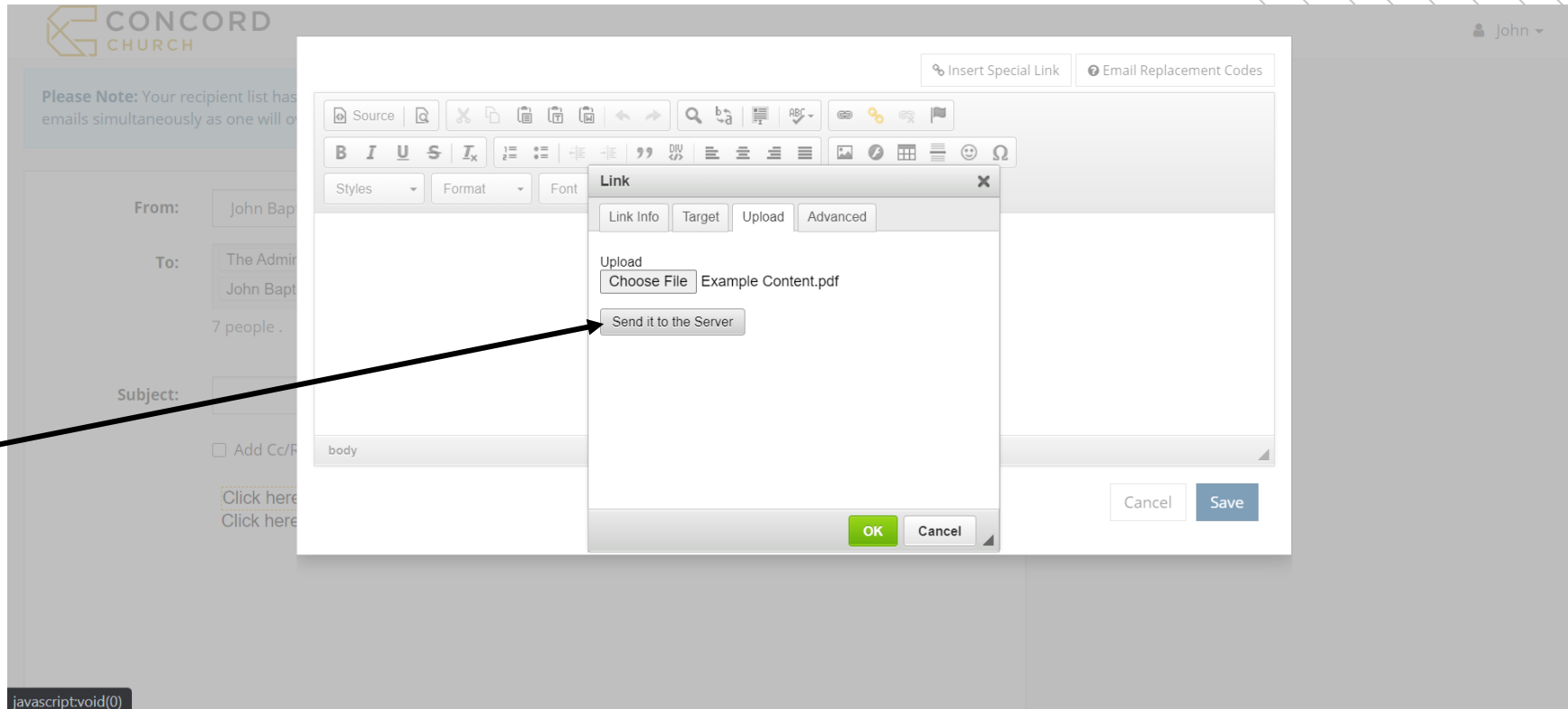


4

Click “Choose File” and select the content you want to add.
(Note: You may only upload files a maximum of 32MB in size.)

Sending Emails – Attaching Links

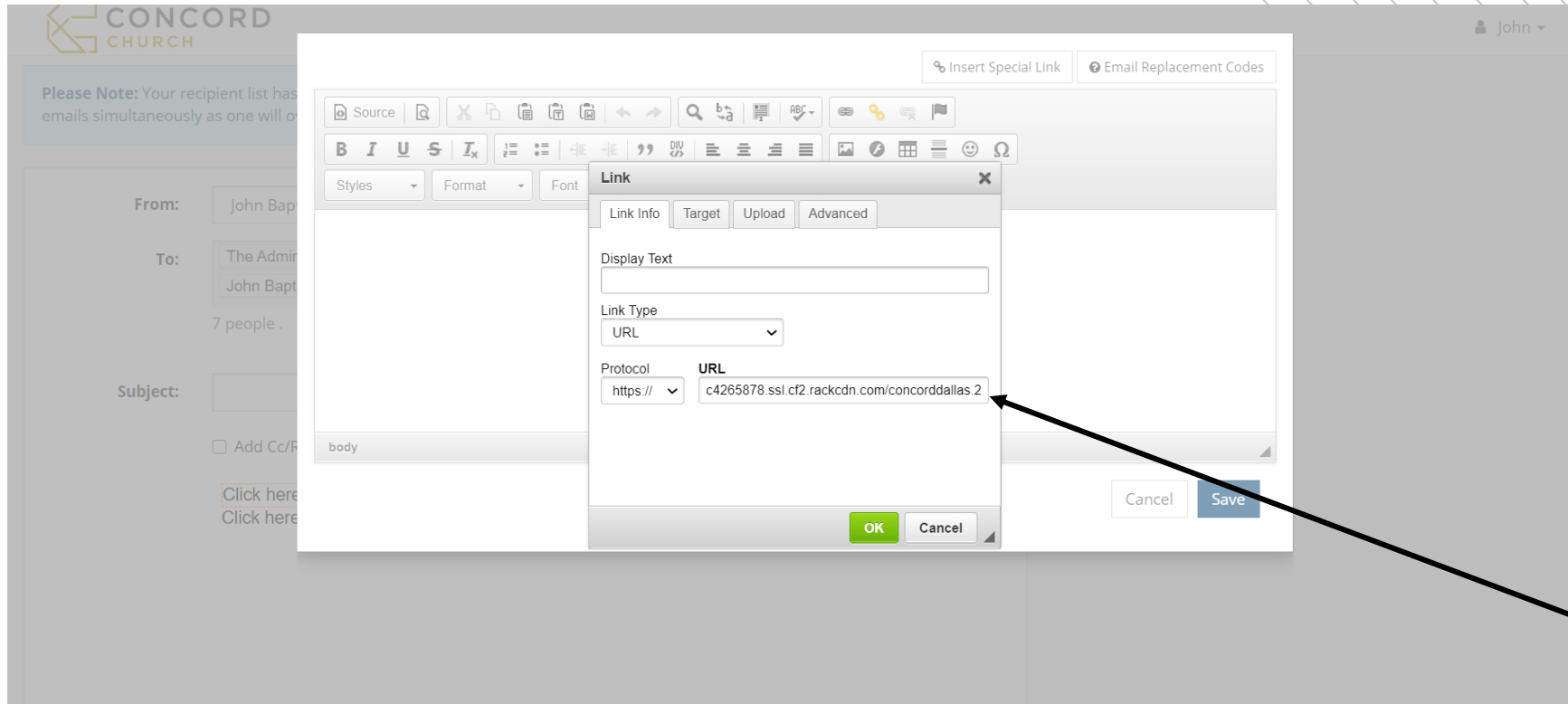
5



5

Once selected, click on “Send it to the Server.”

Sending Emails – Attaching Links

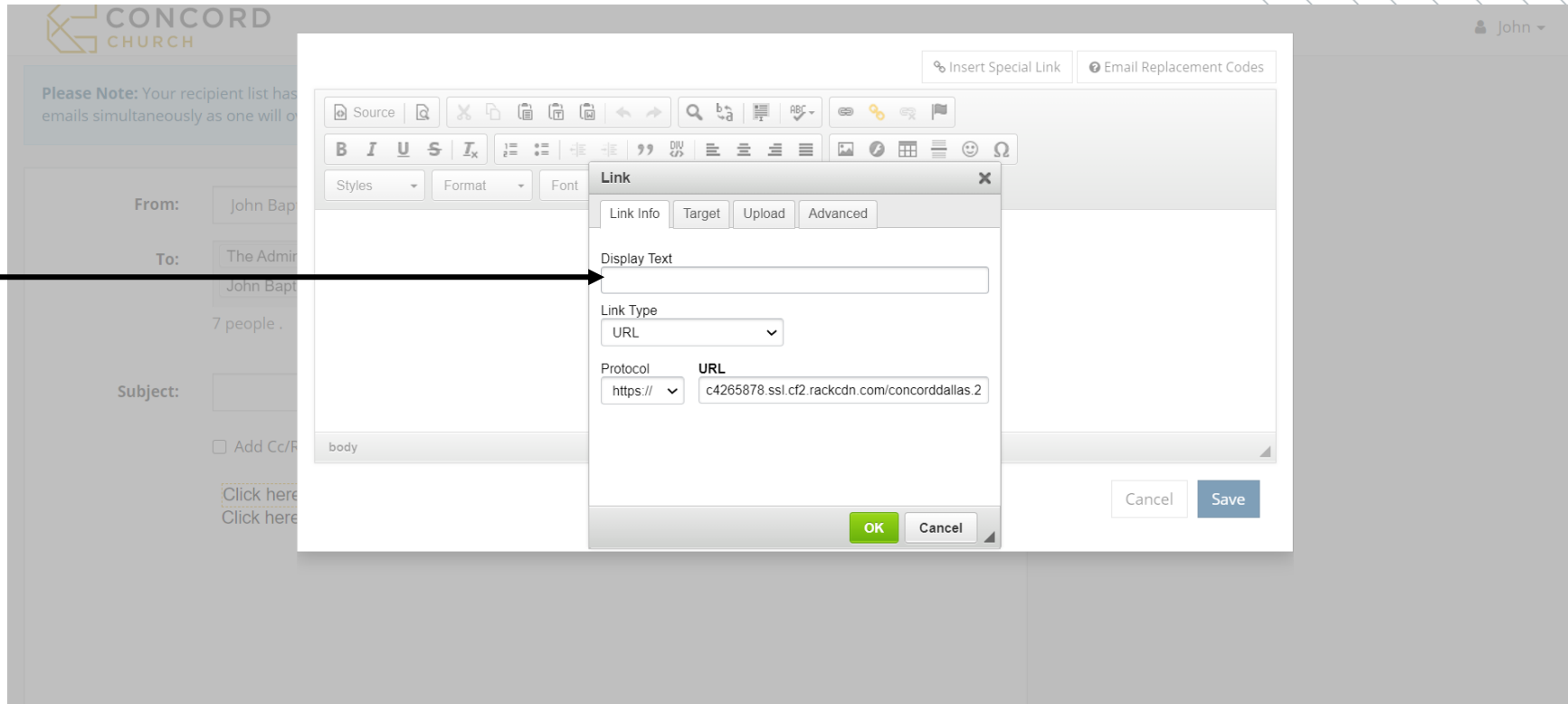


6

Once the upload is complete you should automatically be taken to the “Link Info” Tab. Here, the URL section should be automatically filled, check to make sure it is. If it is not, redo steps 3-5.

Sending Emails – Attaching Links

7

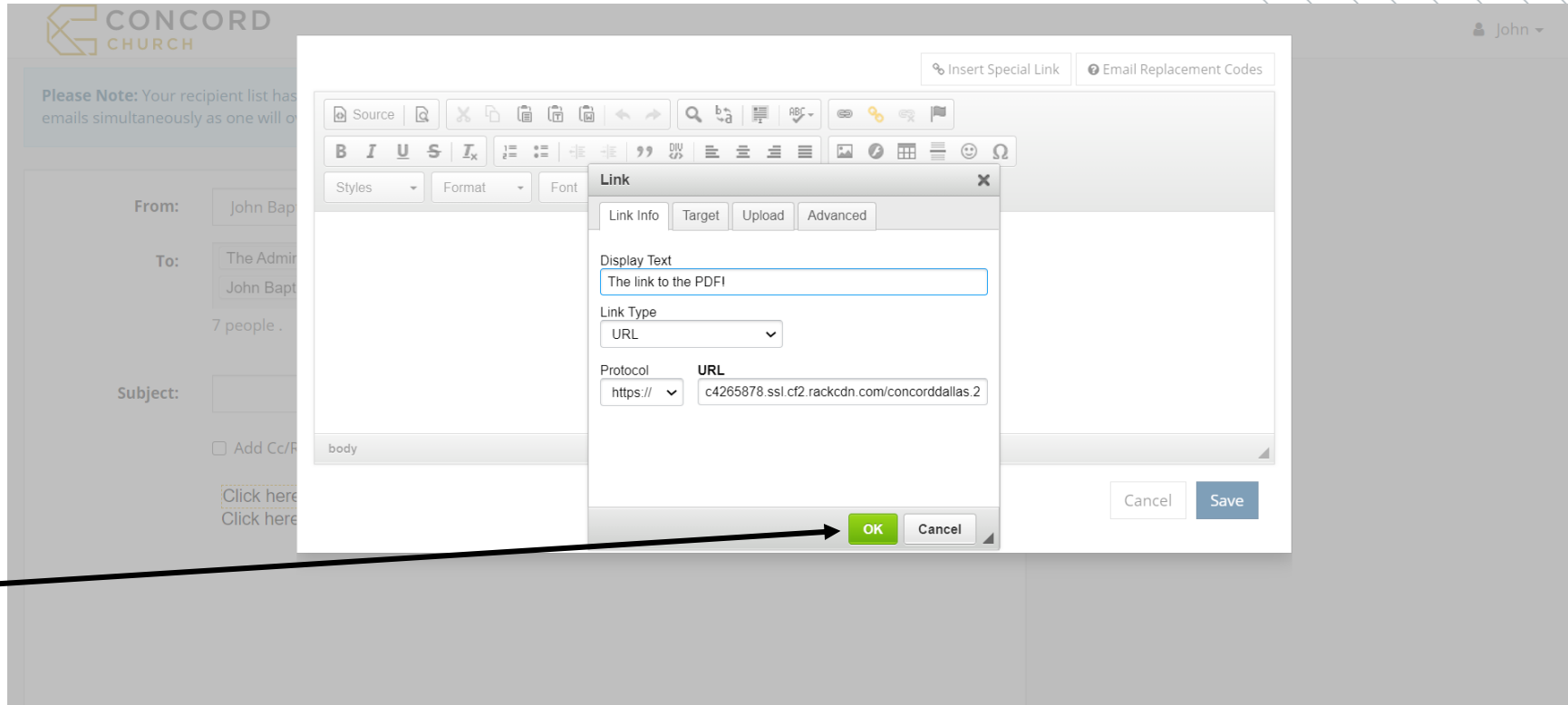


7

With the URL in place, type in the text that you want your link to appear as.

For Example: If you attached a PDF, you can label it “PDF Here.”

Sending Emails – Attaching Links



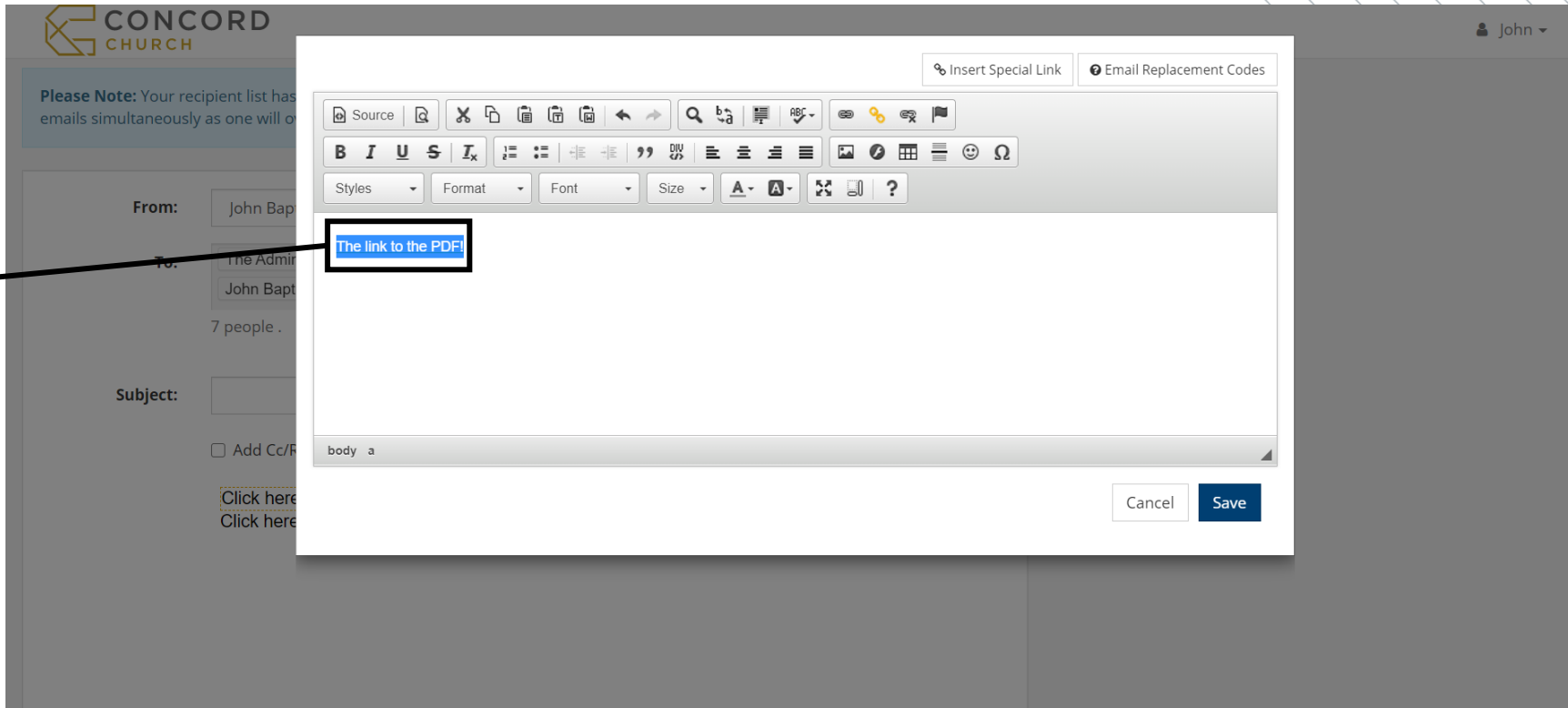
8



8

Once done, click “OK.”

Sending Emails – Attaching Links



9

Your link will appear in the email as the text you entered. When sent out, people will be able to click on this link to access the information you've attached.