

# ChurchSquare Member Directory Guide

## *Version 4*

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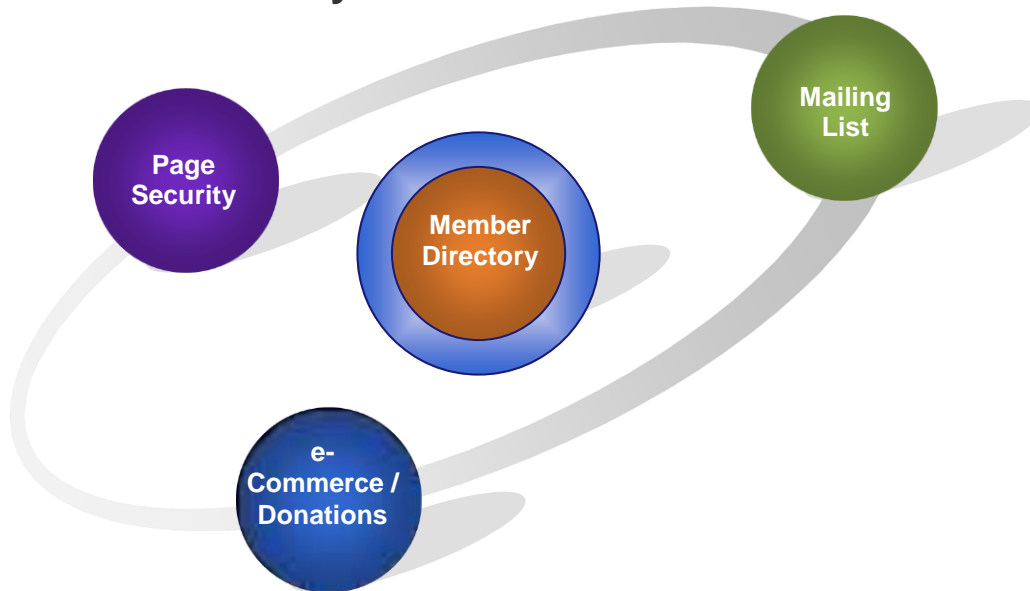
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## Member Directory Overview



This document discusses the Member Directory, but the member directory is closely connected to several other ChurchSquare Site Manager functions:

**Page Security** – Optional Page Security allows you to password protect pages on your website. You set up the password by building user profiles. These can be the same user profiles used in your member directory.

**Mailing List** – All ChurchSquare site plans have the capability to develop multiple mailing lists. If you implement the Member Directory (Interactive Plan and above) and you make mailing list 'public', users can opt-into and out of mailing lists by editing their user profile.

**eStore Donations** -- On ChurchSquare eStore sites the login for e-Commerce customers is the same login they use for their account profile. This feature is useful for organizations using the eStore donation subscription capability. When users login to their profile they can see past eStore activities and cancel donation subscriptions if they have one.

Along with the member directory, these functions form a member management system that features communication management, member directory and profile management, website security access and donation and e-commerce management.

The Member Directory has unique functions that allow you to increase communication with your members and between your members:

- **Customizable** - The information in the directory is completely customizable. You can select the information you collect and the information you display.
- **Searchable** - The user directory is completely searchable for first name or last name, users can also page by the first letter of the last name.
- **Expandable** - You can add as many different User Directories, Mailing Lists, or User groups as you need to your site and there is no limit on the number of user account records.
- **Flexible** – Users can be in multiple lists, directories or groups while maintaining only one central user record.
- **Secure** - You can choose to allow members to add their own profiles but require members to enter an authentication key, preventing non-members from Spamming your site. You can also choose to password protect your directory (using the page security upgrade) or have the directory unsecured, such as a directory of your church staff.
- **Sharable** - Your member directory can be imported and exported in a CSV file and shared for operations like Microsoft Word Mail Merge or with other membership programs.

## Creating a New Member Directory

There are four steps for creating your member directories:

Set up the user group

Create the page to access and view your directory

Structure the content of your directory Populate your directory.

## ***Setting Up the User Group***

The member directory uses the member profiles in a user group as a member directory. A user group is a series of site user profiles. Profiles can be pulled into a user group or created in the directory. That user group then forms the basis of a directory.

User groups may also be used to select profiles for page security - allowing only members of that user group to view a page. The user groups can be used for both purposes simultaneously; for example, you may decide to password protect a member directory and add page security to the directory that only allows members of the directory to see the directory. (Page security is an upgrade for most plans.) To add a new user group:

Login to your site

Click on 'User accounts' from the Admin page under Community / users

On the user group page, you may see several types of groups. If you have an e-Commerce enabled site, you will see e-Commerce groups. You will also see User Groups and Mailing Lists Groups. Click on the 'create new group' link for User Groups

Add a name for the group to the 'Group Name' and click 'Create User Group'.

## ***Creating the Directory Page***

Once the user group is created you will need to add a Member Directory Page. This page displays the user directory and also provides the site editor with the interface for structuring the directory.

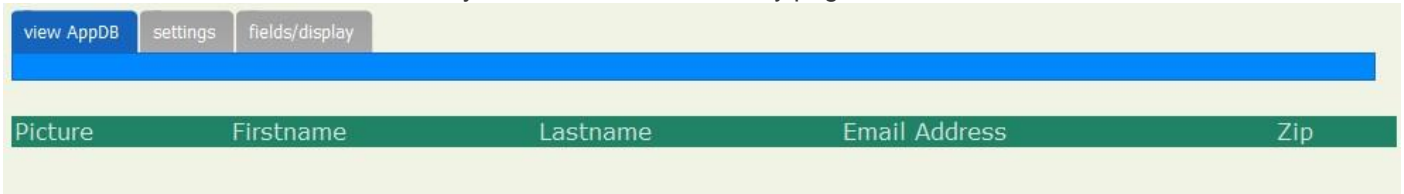
To create the Directory Page:

1. Login to your website and type <https://yourdomainname.org/siteaddpage?allp=true&userdir=preview> into the address window of your browser (of course replacing yourdomainname.org with your domain name) and click enter.
2. Select the 'user directory' page at the bottom right of the page.
3. Add a Page Name in the Page Name input box - keep it short as this will be the menu name. Select a location from the Page Location pull down list. You may want to add the page title and also set the page as 'under construction' until you are finished setting up the directory
4. Under the User Directory Setup add a directory name to the user directory name input box. This name is not displayed on your site so just call it something intuitive like 'all members' or 'youth'.
5. Select a user directory type; this will select the beginning data field structure for your directory. Typically, you will want to select the User Directory – the Church Directory is much more complex and not recommended.
6. Select the user group for the member directory. This is where the profiles for the user directory will reside. Select the user group you created in the previous step.

7. Click 'Create page and view page'.

### ***Structuring the Directory***

Once your member directory page is created view the page. You want to view the page in 'View' and not in 'Edit' mode. A newly created member directory page should look like this:



The screenshot shows a web interface with three tabs: 'view AppDB', 'settings', and 'fields/display'. Below the tabs is a blue horizontal bar. Underneath that is a table with a green header row containing the following columns: 'Picture', 'Firstname', 'Lastname', 'Email Address', and 'Zip'.

Picture	Firstname	Lastname	Email Address	Zip
---------	-----------	----------	---------------	-----

View AppDB allows you to view the directory. The settings tab allows you to control the directory number of rows per page and add search tools. The fields/display tab allows you to set up what information is collected in the profiles and how it is displayed on the 3 different page views (directory main view, user profile view, and user profile edit view).

### **Customize Fields/Display**

Access the user fields by clicking on the tab. After the data fields load, the customize Data Fields should look like this:

view AppDB
settings
fields/display
import
export

**Table Preview:**

Picture	Firstname	Lastname	Email Address	Zip
img	<single line text field>	<single line text field>	<single line text field>	<single line text field>

**AppDB fields/display**  
Use this page to customize the fields/form for this AppDB.

CREATE FIELD

**TABLE: main**  
This is the main table view. Select which fields are displayed in the main table view.

**TABLE: detail**  
This is the record detail page for viewing and editing records.. Select which fields are displayed on the detail page.

**Create field**  
To add a field click the create field button, select the field type, enter the field settings and click apply changes.

**Edit field**  
To edit any field select the field from the list on the right, change the settings and click apply changes.

**Reorder fields**  
To reorder field, click the up and down links..

**Remove fields**  
To remove a field, click the remove link next to the field. The field will be moved to the bottom of the form. You can re-insert it by clicking the insert link or delete the field by clicking the delete link.

**Default sort**  
Select which field is used to sort the overview table.

TABLE: main
FORM: userview
FORM: useredit
default sort: LASTNAME

Picture: img edit up down remove

Firstname: <single line text field> edit up down remove

Lastname: <single line text field> edit up down remove

Email Address: <single line text field> edit up down remove

Phone: <single line text field> edit up down remove

**Available Fields:**

insert field: ADDRESS1	Address	delete field
insert field: ADDRESS2	Address 2	delete field
insert field: CITY	City	delete field
insert field: STATE	State	delete field
insert field: ZIP	Zip	delete field

Cancel
Apply Changes
Apply Changes/View Page

The page defaults to the TABLE:main view and there are tabs for the userview and the useredit.

The 'main' directory listing is the line-by-line listing of the members in the directory that appears on the opening page of your directory. You will want to keep this listing concise as your users will want to be able to quickly scroll through the listings, get contact information or click on the listing to view the user profile (the userview page). At the top is a table preview – note that the preview corresponds to the variables that are in the gray box.

You can change the main table by adding, removing and reordering variables in the gray box. Click the remove link in the gray box to remove a variable – this removes the variable from the view but not from the database (you click the 'delete field' link in the available fields area to delete the field from the database). To add a field to the table click the insert field in available fields. If

you do not see the field you want under available fields you can add it by clicking the create field button.

In the Table:Main tab you can also change the default sort order – typically the last name.

The FORM:userview tab is a listing of variables that will display when a visitor to the member directory clicks on the 'view' link in the main directory. This is the detailed information in the member profile. The same functions for removing, moving or adding variables are available on this page.

The FORM:useredit page is the form that displays to members when they edit their own profile. You may collect information on this page which you do not display on any of the directory pages. This information can also be edited or viewed by the site webmaster but a visitor to the site cannot see it. The same functions for removing, moving or adding variables is available on this page.

**TIP:**

***Make sure you save changes by clicking the 'Apply Changes' button at the bottom of the page. Save often and save before you tab to another view!***

## Populating the Member Directory

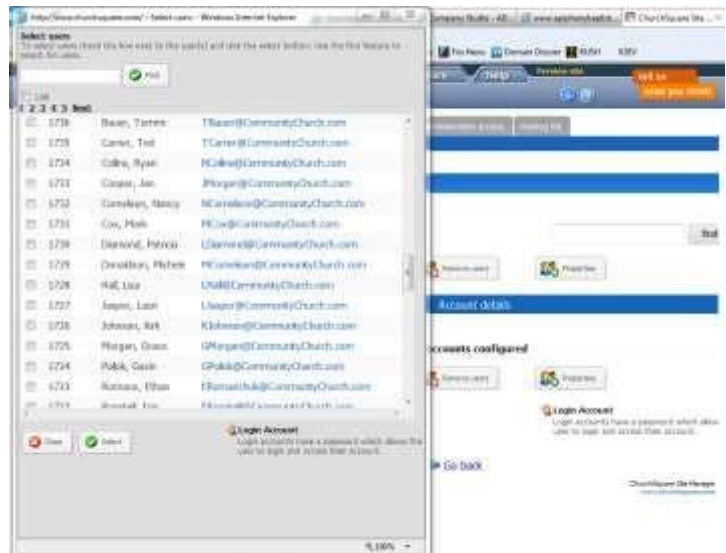
The directory can be populated by:

1. Assign profiles from the all users category and moving them to the Member user group
2. Create users manually inside of the member user group
3. Have users create their own profile through the create account function (you can set an access code for this function)
4. Have users create their own profile using a feedback form
5. Upload profiles using a CSV (spreadsheet) file

## Assign Profiles

This is appropriate when the user's profile already exists on your site. To select a user profile:

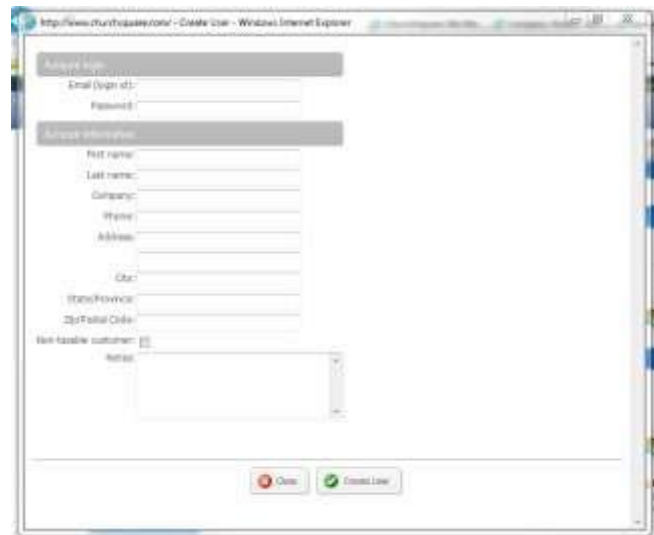
1. Go to your user accounts page
2. Click on the user group name
3. Click on the Assign user button
4. Check the box to the left of the user you wish to include in the member directory
5. Click on the Select button



## Manually Create Users

If you need to add a few users it might be easiest to manually create the new members. To create a new user:

1. Go to your user accounts page
2. Click on the user group name
3. Click on the Create user button
4. Fill in the form, you should at least add the Email and Password and First and Last name
5. Click on the Create User button



## Users Create Their Own Profile

Most Churches will want to enable their sites for self-service profile creation so users can create their own profiles. Users can then add their initial profiles. Users can edit and update their profiles whether or not you have user account creation enabled. To allow users to create their own profiles:

1. Enabling User Account Creation
  - 1.1. After logging into the website click on the User accounts link from the ADMIN page and click on the User account settings tab



- 1.2. Click the 'Enable user account creation from the my account page' option
- 1.3. Enter a Signup Passcode if desired, this will assure that only people with the passcode can create a user account
- 1.4. Select the group you want to put new users in. Usually this would be the Member Directory group, but you might opt for the pending list if you want to review users first. The system does not notify you when a new profile goes into a group so if you are using the pending list you will have to check it regularly
- 1.5. If set up, select a New User Welcome Page. A new user welcome page might have an explanation of how to use the system. If you do not have a page setup for this you can do so later and add this link after the page is setup
- 1.6. Select the Default Page (after login). This will usually be your member directory page
- 1.7. Click the Apply Changes button
2. Creating the Account Login Page
  - 2.1. Go to the add page function on your site and select the first page in the 'Standard blank pages' section
  - 2.2. Add a title to the page such as 'Member Login', select the page location (usually Main Menu since this is the first page users should go to), click the 'Add title to page' option and click the 'Create page and view page' button
  - 2.3. Edit the Member Login page and click the green ADD button in the section1 header
  - 2.4. Go to the Interactive category and select 'Account login form'
  - 2.5. Select the 'Enable user account creation link'. If desired you can add a login message to the form, change the form type size and select a group box to surround the login form
  - 2.6. Click Apply changes.

### ***Create Profiles Using a Feedback Form***

You can also setup a feedback form to create profiles. This will allow anyone to create a profile, so it is useful for directories where you do not want to restrict membership or (since it will send an email to the webmaster when the form is submitted) where you want to put a profile into the Pending list before adding it to the Member user group. To create profiles using forms:

1. After logging into the website go to the add page function and click on the form builder page in the Interactive pages section
2. Add a page name (like Member Signup), choose a page location, select the add title to page option and click create page and view page
3. Edit the page and edit the form component
4. Click the add record to basic contact db/lead database option under form options
5. Select the User Group you want to add the record too; choose the Pending list if you want to approve the new member first

6. Modify the form fields as needed. You will see that once you selected the User group most of the form fields turned blue as they correspond to fields in the database. The comments box does not and comments will not be added to the database so you can delete that field. You may want to add additional fields like Phone Number. Once you add the field check the Contact database field in the Form Field Properties box and select the appropriate field – for example 'phone'
7. Make sure you add the Password field, so users can login to modify their profiles
8. Modify the form messages as appropriate
9. Click Apply changes

When a member adds a profile to the Pending list the webmaster will receive an email. Once the webmaster approves the membership they can add the profile to the membership user group and delete the user from the pending list.

### ***Uploading or Updating with a CSV file***

If you have a large number of profiles to upload or update you can use a CSV file. A CSV (comma-separated-values) file can be created with programs like Microsoft Excel; when saving the Excel spreadsheet simply choose '.csv' as the file type. Uploading users to the member directory is a 2-step process. First you must upload the user to the member user group and then you have to add the additional information to the record using the export / import function of the member directory. To upload users with a CSV file:

1. Adding records to the member user group
  - 1.1. After login into the site click on user accounts from the ADMIN page

- 1.2. Click on the Import users 'sample' link and open the file and it should open in a spreadsheet if you have the spreadsheet set as your default program for opening CSV files, if not select Save As and save the file and then manually open it with your spreadsheet program.
  - 1.3. Delete the sample data from the spreadsheet but leave the header row
  - 1.4. Add in your user data, one user per row. Make sure you specified your group as the member directory user group
  - 1.5. Save the file as a csv file
  - 1.6. Back on the site click on the import users link
  - 1.7. Click the brows button, find your file, click open and the upload. The system will attempt to parse the data and give you a sample and if you believe the sample looks like the data is correct confirm the upload.
2. After your users are added to the user group export them, edit them and re-import them to your directory
    - 2.1. After logging into your site go to the Member Directory page and click on the fields/display tab and then on the export tab
    - 2.2. Click Start Export
    - 2.3. Click on download export file link and you should see a yellow bar at the bottom of your browser, Open the file and it should open in a spreadsheet if you have the spreadsheet set as your default program for opening CSV files, if not use the down arrow in the SAVE button to select Save As and save the file and then manually open it with your spreadsheet program.
    - 2.4. Your users in your database have a value in the RECORDID column. Do NOT change these values or delete this column. You will not add data to this column either, this value is assigned by the system and used as internally only.
    - 2.5. Add additional user's data to this spreadsheet columns as appropriate but do not create new users here as the users will not have a password and will not be able to login to their accounts and edit their information
    - 2.6. Save the file as a .csv file
    - 2.7. Back on your site click the import tab
    - 2.8. Click the browse button and navigate to your csv file
    - 2.9. Click upload and you should see an IMPORT COMPLETE message.

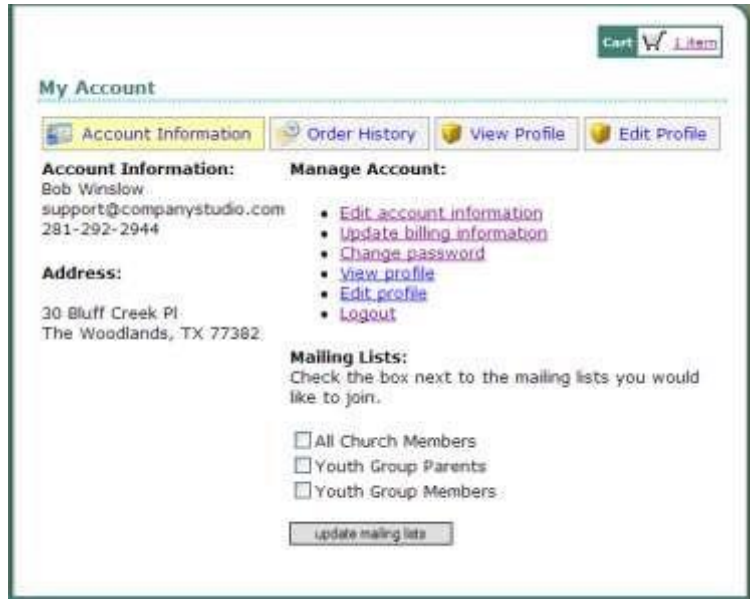
## Maintaining Member Directory

The Member Directory does not require any specific maintenance and user accounts can be maintained by users. However it may be useful to familiarize yourself with what can be changed.

## User Account Maintenance

The Member Profile Accounts are completely self-service. Once user's login and go to their account they will see a screen that will depend on whether they are in a member directory, are an e-Commerce customer or both. A login screen for a user in a directory and an eCommerce customer is pictured right. Users can click the links to edit all of their information.

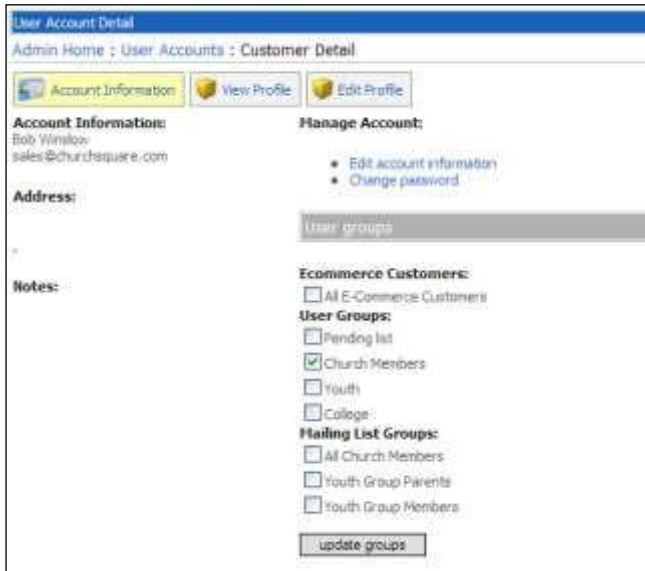
- Click on 'Edit profile' and change any variable in the profile including their email, which doubles as their user login ID. They can only change their email if the new email they enter is not in use in another profile.
- Click on the 'Change password' link after they login to their account to change passwords.
- Click any of the mailing lists checkboxes to be added or removed from the email list.
- If they are an e-Commerce account, they can also click on 'Update billing information' link and change or add a credit or debit card through a secure (https://) interface. This is useful for users who have subscribed to a donation product or other subscription, so they can update their billing information when it changes.



## Webmaster Account Maintenance

If the ChurchSquare site editor wants to make account changes they can login to the website as a ChurchSquare editor and access the profile. They can access the profile in the member directory or by clicking on the appropriate User Accounts from the User Accounts page (accessible from the Admin page). If the profile is accessed through the member directory, updates can be made only to the useredit variables and the password. Billing information, the user group membership, mailing list sign-up and other data for other directories are not available. Changes to the profile are saved by clicking the 'Save Changes' button at the bottom of the page.

Editing the profile is also accessible by clicking on the profile from the User Accounts page but still not the billing information, or other data for other directories. Click on the User Groups name and then on the 'Account Details' link for the profile you want to edit.



The three tabs along the top, 'Account Information', 'Profile' and 'Edit Profile' give you access to view and edit the profile. From the 'Account Information' members can be added or removed from user groups and mailing list groups. Once the changes are made, click the 'update groups' button to save the changes.

Clicking on the 'Profile' link shows you the information in the profile while the 'Edit Profile' link allows changes to be made to the information. Once you make changes, be sure to click the 'Save Changes' button at the bottom of the page.

The 'Change password' link brings you

to a change password page. The 'Edit account information' link allows you to change e-Commerce account information (but not billing information).

## Deleting Old Profiles

To delete a profile access the profile through the 'User Accounts' page (accessible through the Admin page) by clicking on the appropriate user group and then on the user's 'Account Details' link. On the User Account Detail page unclick the selected user groups and mailing lists. If you unclick the 'All E-Commerce Customers' check box the user will no longer be able to login in to make purchases using their account.

## Changing Data Displayed

You can edit the data collected and displayed in a directory. Edit your site and go to the Directory display page and click on the 'fields/display' tab. You will need to remove variables from all pages on which they are displayed if you do not want them in the directory. Remember to click 'Apply Changes' before exiting each tab.

## Change the Signup Passcode

If you enable the Signup Passcode on the site user settings, you may want to change that passcode routinely. Edit the site and go to the login page and click on the 'customize user account settings' link. Change the passcode and click 'Apply Changes'.

## Working with Mailing Lists

The mailing list function is available on all ChurchSquare plans (but the Member Directory is available only on Interactive and above). There are two types of mailing lists, the 'General mailing list' and 'Account based mailing lists'. The General mailing list is not tied to accounts and users opt-in to that mailing list through a mailing list link on your site. When you implement Account based mailing lists it is usually best to delete the links to the general mailing list access from your site. Having both types of lists on your site will surely confuse visitors.

Users can opt into the mailing lists when they set up their profiles. You can also edit their profile through the User Accounts page by clicking on the user group and then on the 'Account Details' link and click the appropriate Mailing Lists check box. You can also open a mailing list user group and move in users through the 'Assign Users' or 'Create Users' functions. The lists can also be managed by clicking on the appropriate 'manage users' link on the Mailing List page. See [Appendix II](#) for further information about mailing lists.

**CAUTION:**

***Do not add names to email lists unless you are SURE that you have permission for the user to do so. Sending unsolicited email is NOT permissible for ChurchSquare customers. We take anti-Spamming practices seriously. Your site may be de-listed if we receive successive complaints of Spamming.***

## ChurchSquare Resources and Support

This manual cannot cover all possible instances you might encounter managing your Member Directory. There are several areas you can turn to for help:

- Your website contains overview instructions for many functions on the site. Make sure you are familiar with the information on these pages.
- When editing the site, you can click on the support link located at the top of the page in the header to the right. The support link has three areas to help:
  - A list of help Topics in the right-hand column
  - A knowledge base search box at the bottom of the topics column
  - Many tutorials on the functioning of your website
- A form for support questions if you cannot find the answer to your questions from the other resources.
- You can also contact ChurchSquare by emailing us at [Support@ChurchSquare.com](mailto:Support@ChurchSquare.com) or calling during regular office hours (Central time) at 1-800-883-1773.