



"Outreach Connect"
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"Outreach Team Member User Guide"

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Outreach Team Member Training video Click: [HERE](#) (Video Run Time 10 minutes)

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Using the Outreach Team Members Check-In Check-Out Program

Provide your people (Outreach Team Members) with their personal username and password. You will need to instruct them to use to the provided URL to open the "Outreach Connect" site the first time they use the program. Encourage everyone to bookmark the site for fast access on their next login, and to secure and remember their username and password.

Once they open the program, they will see a screen that asks for their username and password. They enter those, and press the **Start** button. On the next page, they will see a list of the prospect and guest documents that you uploaded.

They have two actions they can do: **View Doc** and **Check-Out**. The View Doc link gives them the ability to view the prospect or guest informational document. When they press the View Doc link, they will see some info about the document and a View Here link. Depending upon which browser they are using, they will either see the document appear on their screen. OR it will ask if they wish to save it to their hard disk. Should the outreach team member decide to follow-up with this prospect or guest they need to print the document at this point for their use in the follow-up process.

Note: This is a way to preview the prospect or guest informational document, and print if you are going to follow-up with this person or family.

When they decide they'd like to Check-Out the document and follow-up, they press back to document list and then the **Check-Out** link on the same line as the document name. This also gives them a chance to view the document again, if they wish, but the main thing is that they can press the button labeled: "Yes, I will Checking Out and follow-up".

They can (optionally), but should enter some comments as they check-out the document. It is up to you to tell the users what kind of comments you would like to see here.

After pressing the button, they come back to the Documents Listing Control Panel. But now there is a red **Checked-Out** message on that document. No one else can access that prospect or guest informational document. (This prevents two people form contacting and following-up with the same person).

Everyone else will see the word **Info** next to a checked-out document. And when clicked, Info will reveal who has checked-out the document, the date and time they checked it out. BUT for the user who has checked out the document, when that user views the Document Listing, there will be a **Check-In** link next to that document. Thus, only the original user who checked-out the document can check it back in.

And when the original user pressed the **Check-In** link, they will see another window with response fields and comments boxes so they can enter comments and notes explaining the action taken and results of their follow-up process. They may also enter their suggested or recommended next actions. It is up to you the outreach coordinator to tell the users (outreach team members) what kind of comments and information you would like to see here. They may also choose to copy a SS teacher or other person with the results of their follow-up by e-mail. They will simply enter their e-mail address in the provided box separating them with a (,) or (;).

Then they press the button labeled Yes, I Am Checking-In This Document Now. And when that happens, the document is status changes to **Completed**.

Note that any document that has been previously checked-out now has a new kind of link under the View column. It will say View History instead of View Doc. And thus, anyone can view the entire history of who checked out that document, and when.

Note that there is one button at the top of the page called Select Documents. This is there in case your list of uploaded documents is rather long. Thus, the users can select which documents they would like to see in the Documents Listing. They can select by Category or by Title.

Thus (for example) if they choose the **Adult** category, they will see only the documents in that category. They can even choose to view a document with the word 'Smith' in the title AND the category Adult. But that will likely only result in one document to see in the listing.

As you use the program you will find it very user friendly and easy to understand. You may find several other features and function that are not covered in this documentation. They are very useful features that will be obvious to there function and purpose. Should you need additional assistance please contact your church's Outreach Ministry coordinator?

Congratulations, you are now ready to follow-up with guests and prospects!

NOTE:

After opening the "Outreach Connect" Team Member site using the links or URL provided you will see an option for book-marking the opened site to your favorites list. Once the link is added to your favorites it may be used to login the next time you visit your church's outreach ministry site.