OUTREACH MINISTRY

"Outreach Connect"

<u>Five Step Quick Start Guide</u>

(Please follow the five quick start steps in the order which they are listed)

1. Before you get started you should have saved the information for each one of your guests and prospects as a separate document. These documents may be saved in a word, pdf, or excel format. We recommend that you name each document using the guest or prospects name and the date of their visit, or the date it was created. (Example: Mike Turner Family 02-01-2007) Then you should store these documents in a folder on the administrator's computer named "Outreach Prospects". This will allow you to locate and identify the documents you need to upload to the Outreach Connect program easier and more efficiently. This will also allow your outreach team members to login to their site and see the prospect or guest names in the list. They will then have the option to view and/or Check-out the attached document(s) and follow-up.
   (*If you do not have a database program that provides an option to create a guest/prospect report document, we have made a generic PDF template available for you. It is located at the bottom of the "Outreach Connect" page on the CAA Ministries website.)* www.caaministries.org

2. Next, login to the "Outreach Connect" Administrator's Site using the provided links, user ID, and password. You will see a blue band that contains several icons. First, click on the icon titled "Configure" and start by clicking step 3. This is where you will be able to personalize some of the information and functions for your sites configuration. You may also change your administrator's user ID and password.

3. Next, you will need to click the icon titled "Add People". This is where you will need to enter the name and e-mail address for each member of your outreach ministry team. Also, you will need to assign each person with a user ID and Password.

4. Next, you will need to click the icon titled "Define Document Categories". You will need to enter the different categories you prefer to use. Categories are used according to how you wish to structure your church's outreach ministry follow-up process. For example you may want to categorize documents by age groups, Sunday School classes, or specific ministry teams. This allows outreach team members to better identify prospects or guests that they will relate to, or that they are trained and/or are recommended to follow-up with.

5. You are now ready to upload and post your prospect and guest information to your sites. Click the icon titled "Upload Documents" this will open a window where you can upload as many as ten documents at a time. Click the browse button and navigate through your saved information until you locate the folder and files you save in the above step #1. Add the prospects and guests to the upload list and assign each with the appropriate category. Finalize by clicking the button at the button that reads "Upload the Document(s)" Your prospects should now be displayed in a list on both the administrator and team member sites with the status reading "Available".

Congratulations, you are now ready to launch your outreach ministry into action!