eAdventist.net

HOW TO

These cards are quick, easy-to-follow instructions for how to do basic transactions in eAdventist.net, making your job as an online clerk easier! Keep these cards near your computer so you have ready access for how to do various functions. Read the index page to see all the situations that are addressed.

If you have a problem or feel unable to solve an issue please do not hesitate to contact me and let me know. I am happy to help!

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HOW TO

1

add a new family

1//Go to People tab, select new family in sub menu.
2//Enter last name.
3//Enter first name.
4//Next to the Church tool bar click on the drop down arrow and choose a church.
5//Enter gender by clicking on the down arrow and making a selection.
6//Enter marital status by clicking on the down arrow and making a selection.
7//Enter date of birth (if year is unknown enter 1800)
8//Enter phone number and email, if known.
9//Enter address.
10//Click Save.

*When a person is entered, they will be listed as a nonmember until you change their status to member by baptism or profession of faith.

*A transferred individual will automatically be moved to your church membership list once the name has been accepted. DO NOT enter them as a nonmember. Wait for the transfer to come through.

HOW TO

2

add a new family member to an existing family

(Note: one member of a family needs to be displayed on the screen in order to add additional family members).

1//Go to People tab, select advanced search in sub menu.
2//Enter last name of family.
3//Click Search.
4//Click on head of household's name (Primary Contact).
5//Click on New Person tab at bottom right corner.
6//The cursor will then be located at the First Name location.
7//Enter first name, gender, marital status, and date of birth. *(if the last name is different make that correction also).*
8//Click Save.

*Notice that many of the fields are filled in, saving you key strokes.

*Repeat these steps for each new person added to the family unit/account.

HOW TO

add a vacation address to a family's account

(For families who are gone for 2-3 months at a time).

1//Go to People tab, select advanced search in sub menu.
2//Enter last name of family.
3//Click Search.
4//Click on head of household's name.
Note: *the address will change for all members of the family account.*
5//Click on "Edit Person."
6//On the "Addresses" line click on the gray box "Alternate."
7//Enter the vacation or temporary address.
8//The lower right side of the screen is "Default Address Type" with a drop-down tool bar. Click on the tool bar and click on "Alternate."
9//Click Save.

*All mailings will now be sent to the Alternate address.

*Remember to change the address back to "Street" in the Default Address Type drop-down box after the family has returned.

HOW TO

add a person by baptism/profession of faith

1//Go to People tab, select advanced search in sub menu.
2//Enter person's last name.
3//Click Search.
4//Check to see if the individual has already been entered as a nonmember. If not, then refer to #1.
5//After individual has been entered as a nonmember you will then change their status.
6//Click on "Change Status" tab.
7//The system default is set to "Baptism." All you need to do is enter the baptism date in the effective date space. For POF see #9 below.
8//Click Save.
9//If the individual is becoming a member by POF, click on the down arrow by the word "Baptism" and select Profession Of Faith.
10//Enter the POF date in the Effective date space.
11//Click Save.

*If this is a child, look up the parent's name so you can enter the child in the correct family unit. *Refer to #2*

*New feature: after entering the baptism or POF date it may ask you to select the Pastor who baptized the individual. Just click on the pastor's name and Save. You also have the option to enter a Pastor's name.

HOW TO

5

enter a rebaptism date for an existing member

1//Go to People tab, select advanced search in sub menu.
2//Enter last name and first name of individual you wish to mark as 'rebaptized."
3//Click Search.
4//Click on the individual's name.
5//Click on the "Change Status" tab.
The default is set to "Baptism."
6//Click on the drop-down and choose the option "Rebaptized."
7//Enter effective date.
8//Click Save.

*Do not make the rebaptized person your member without checking to see if they have membership elsewhere – otherwise they will have dual membership!

*If the individual is NOT a member of your Church, then email the clerk of the church holding their membership and let them know the date of rebaptism.

*If the individual wishes to become your member, then request a membership transfer. Once the person is transferred you can enter the date of rebaptism.

HOW TO

6

change the primary contact

1//Go to People Tab. Select Advanced Search in the sub menu.
2//Enter last name.
3//Choose an account from any member of the family. Click on that name.
4//Click on "Change" by the current Primary Contact name (lower right-hand side of the screen).
5//Select a new Primary contact for this family.
6//Click on the dot next to the person's name who is to be the new Primary contact for this family.
7//Click Save.

*The Primary Contact will need to be changed if that person is deceased, a divorce and the family must be split, removed from membership, etc.

HOW TO

join a person from one family to another family

1//Go to People tab, select Advanced Search in the sub menu.
2//Enter the last name of the individual you are searching for.
3//Click Search.
4//Click on the person's name you wish to move. When the account opens up make sure the correct name is at the top of the screen.
5//Be sure the individual you are moving is NOT listed as the Primary Contact in their family unit. *Refer to #6 if needed.*
6//Click on "Change Family."
(Gray tab in the middle of the screen).
7//Select the second option – "join an existing family."
8//Click "Select" at the end of the blank gray space.
9//Enter the last and first name of the family to join.
10//Click "Search."
11//Once the name appears, click on the dot by the correct individual's name.
12//Click "Select."
13//When the page refreshes you will see the family name in the space just to the left of the "Select" button. If this is correct, click "Save."

*Be sure the individual is properly identified: (i.e. married, widowed, male, female, etc).

HOW TO

split a person off from a family to form a new family

1//Go to People Tab. Select Advanced Search.
2//Enter last name.
3//Choose the correct individual to be split off and click on that name.
4//Be sure the individual to be split off is NOT the Primary Contact in their family unit. *Refer to #6 as needed.*
5//After verifying that you have the correct name at the top of the Screen click on the gray tab "Change Family."
6//Select the first option "Create a New Family."
7//Click Save.
8//When the page refreshes the individual will now be in his own family unit.
9//Enter contact information for the newly formed family.
Refer to #1 if needed.
10//Click Save.

HOW TO

change the name of the church for nonmembers

1//Go to People tab, select Advanced Search in the sub menu.
2//Enter the last name of the individual you are searching for.
3//Click Search.
4//Click on the name of the nonmember you are wishing to change.
5//When the correct nonmember is on the screen click on the "Change" tab next to the Church name (top right side of the screen).
6//On the next screen you will see "Select" at the end of the gray tool bar for "New Church."
7//Click "Select." Type in the new church name, click on "Search."
8//Once the new church is located, click on the dot to the left of the church and click "OK."
9//The new church name will now be listed in the tool bar.
10//Click Save.

*If the nonmember is a part of a family that has transferred to a different church you will see a "catcher's glove" icon next to the nonmembers name. Click on the glove icon and the nonmember will be joined to their family group.

*Note: Nonmembers are not transferred. They will remain on your books unless you move them or delete them.

*This procedure is most often used for children who need to stay with their family unit.

HOW TO

remove someone from membership (death, missing, etc.)

1//Go to People tab, select Advanced Search in sub menu.
2//Enter last name.
3//Click Search.
4//Click on name to be Removed.
5//Click on "Change Status."
6//Deceased is the default option. Enter date of death.
TIP: *If date is unknown, enter today's date.*
7//Click Save.

For Missing or Removed:
8//Click on down arrow by Deceased for Missing or Removed (Removed is for apostasy or request only).
9//Enter effective date (date of church business meeting vote).
10//Click Save.

*The "Removed" option is NOT to be used when someone transfers out of your church, was mistakenly added to your membership list, or is incorrectly listed twice in your membership records. It is only to be used after a church business meeting has voted to remove someone from membership (missing, removed). If the member has initiated the request, you may enter the date of their request to the church board as the removed date. The request does not go before the church.

*Please call me for any assistance.

HOW TO

delete a nonmember

1//Go to People tab, select Advanced Search in the sub menu.
2//Enter last name.
3//Click search.
4//Find the nonmember that you wish to delete and click on their name.
5//On the non-member's account page click on "Change Status."
6//The default will be "to member." Click on the second dot that says "to deleted."
7//Enter effective date.
8//Click Save.

*You can only delete a nonmember.

*You cannot delete a member.

*If a name needs to be removed, contact me about the situation and I will instruct you about what procedure to follow.

HOW TO

request a transfer to your church

1//Go to People tab, select Transfers in sub menu.
2//Click on "Request Transfer" tab.
3//By the first line, "To Clerk of," click on "Select."
4//Enter the name of the Church where the member requesting a transfer has said their membership is **currently** located.
5//Click on "Search."
6//Click on the dot next to the correct church name.

TIP: If the name does not appear, go back to the church name search and enter fewer words. **Example:** Instead of entering Milwaukee Northwest Seventh-day Adventist Church, just enter Milwaukee.

7//Click "OK."

8//By the second line, "To Join," click on the down arrow and click on YOUR church.

TIP: You are only able to enter your church name. You will not be able to move their membership into the wrong church!

9//Enter the last name.
10//Enter the first name.
11//Enter the date of birth, if known. This is very helpful, especially if a father and son have the same name. It lets the other clerk know which one is transferring.
12//Click Save.

HOW TO

request a transfer to an off-system church (outside of North America)

1//Go to People tab, select Transfers in sub menu.
2//Click on Request Transfer tab.
3//In the Transfer member box click on the dot by the second option: to an Off-System church (from my church).
4//"To clerk of," click on the down arrow and enter your church name. TIP: You are only able to enter your church. You are initiating the transfer for the other church since they are off-system.
5//"To Join," click on "Select" at the end of the gray bar.
6//Enter name of off-system church, hit Search.
7//Click on the dot next to the correct name. **TIP:** If the name does not appear, go back to the church name space and enter fewer words for the church name. **IF** you do not find the name – **STOP** and call me or email me at the Conference office. You will need to have the full name and address of the overseas church when you contact me.
8//If you do find the church listed, put a dot next to the church name.
9//Click OK.
10//Enter the last name.
11//Enter the first name.
12//Enter the date of birth (very helpful).
13//Click Save.

*The member has now been removed from your church membership. They will have an account in eAdventist but it will record them as a member in the off-system church.

HOW TO

check on a transfer

1//Go to People tab, select Transfers in sub menu.
2//Locate the name of the individual you wish to check. (Look in the TO GRANT or TO ACCEPT column).
3//Click on the word "VIEW" to the left of the name.
4//The next screen will show both churches involved in the transfer as well as the individual's name and the clerk's name.
5//Place your cursor over the name of the ***other*** church (not your church) and click.
6//The next screen will show the organization information for the ***other*** church.
7//Click on the Contact tab located in the gray bar just above the list of church officers.
8//This will display the contact information for the church clerk in the **other** church. This is the person to contact regarding the transfer.

*You can also leave a question on the View screen asking about the status of this transfer. The conference clerk receives a copy of all comments.

*Remember, each church has **90 days** allotted for completing their part of a transfer. Be patient, but if the 90 days are up please call or email the clerk to see if there is a problem.

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change incorrect spelling and/or name of an individual to allow a transfer

1//Go to People tab, select Transfers in sub menu.
2//Click the word "VIEW" to the left of the member's name.
3//Click on the gray "Grant/Deny" tab.
4//A box will pop up titled "Select Person." Click on the dot of the correct member who is transferring.

Note: *If an option is not there you may need to type in a name in the search toolbar and do a search. If you are unable to find the correct name please contact me.*

5//Click on the gray "Select" tab.
6//Enter the effective vote date.
7//Click Save.

*When you go back to the transfer list you will see that the correct member was "pulled in" and the incorrect name is now corrected.

*If you have any issues please contact me.

HOW TO 16

verify a newly transferred member's contact info

1//After entering the 2nd reading date for a newly Accepted member, click on Save.
2//The next screen will have the transfer info. At the top there will be a bar that says: *"Transfer accepted. This person has been added to your church. View this Member."*
3//Click on "View This Member."
4//Be sure your new member is NOT a part of a family that belongs to another church. If so, you will need to split this person off to make a new family (See How To Card #8).
5//If needed, move the person to his own family and enter his new address. **TIP:** Click "Edit Person." Enter changes.
6//Click Save.

***TIP:** If you leave the person who is your new member with the rest of his family and they live elsewhere with a different address, your changing the address without moving your new member will change the address for EVERYONE in that family – even if they are not your members!

*As soon as you have a new member, always check this added feature immediately.

HOW TO

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print reports

1//Go to Reports tab. Select Reports in the sub menu.
2//Select the report you want to print by placing cursor over name of report and clicking.
3//Depending on the report you select, you may also be asked to select the year, time period and report format. *These options are located in the upper left-hand corner.* Use drop down arrows as needed to view and select options.
4//Click on box to the left of your church name.
5//Click on "View Report."
6//Print Report.

TIP: You will only be able to view reports from your church.

*This is where you have the option to print a directory, including large print.

*Some of the available reports are: birthday lists, membership lists, and family lists (includes members and nonmembers).

HOW TO

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print church member mailing labels

1//Go to People tab, select the Person Labels in sub menu.
2//On the Person Labels page select the parameters you wish for your labels.
3//On the bottom right, you can view your list by clicking on the gray "Search" tab.
4//To print a label list, select the gray "Print Labels" tab on the far right of your screen.
5//Click on the printer icon. Be sure you select from your printer options the correct size option for your labels.

***TIP:** Use Avery 5160 labels (30 to a page, 3 columns of 10).

HOW TO

change an office title from one person to another person

1//Go to Organizations tab, select Search in sub menu.
2//In the toolbar next to Search for: enter your church name.
3//Click Search.
4//Of choices that are given, click directly on your church name.
5//Your church organization is now showing.
6//Click directly on the office title.
7//Click "Select Person."
8//Enter last name and first name of new officer.
9//Click Search.
10//Select correct name and enter a dot to the left of the name.
11//Click Select and Save.

TIP: You can view other church organization pages but you will not be able to change their officer roles.

HOW TO

add a new office and officer

1//Go to Organizations tab, select Search in sub menu.
2//In the toolbar next to "Search for" enter your church name.
3//Click Search.
4//Of choices that are given, click directly on your church name.
5//Your church organization page is now showing.
6//On the far left, select "New Office."
7//By the "Office Title" toolbar click on the down arrow for selection of offices.
8//With your cursor, hover over the office title you are looking for and click.
9//By the Officer toolbar click on Select person.
10//Enter last name and first name of new officer.
11//Click Search.
12//Select correct name and enter a dot to the left of the name.
13//Click Select and Save.

HOW TO

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delete an office

1//Go to Organizations tab, select Search in sub menu.
2//In the toolbar next to Search for: enter your church name.
3//Click Search.
4//Of choices that are given, click directly on your church name.
5//Your church organization is now showing.
6//Scroll down to find the office to be deleted.
7//At the far right of the office to be deleted there is a trashcan icon.
8//Click on the trash icon. When the page is refreshed it will no longer
show this office on your organization page.

HOW TO

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renew a current church officer

1//Go to Organizations tab, select Search in sub menu.
2//In the toolbar next to "Search for" enter your church name.
3//Click Search.
4//Of choices that are given, click directly on your church name.
5//Your church organization page is now showing.
6//If an office/officer is ready to be renewed, on the far right you will
see the word "renew" (orange font). Click on the word "renew."

**You will be unable to renew your Pastor. Contact your Conference Membership Clerk to have this officer role renewed for you.*

HOW TO

enter attendance

1//Go to Organizations tab, select Attendance in sub menu.
2//Click on the gray tab, Add Attendance.
3//A box will pop up on the screen titled "New Attendance."
4//In the toolbox next to Meeting, click on the down arrow.
Click on the meeting you are recording attendance for.
Example: *Monroe Weekly Church Service or Monroe Weekly Sabbath school.*
5//Next to "Meeting on" fill in the date.
Tip: You can enter this manually or click on the calendar icon and click on a date.
6//Next to "Head count" enter the attendance number.
7//Next to "Online count" enter a number, if applicable.
8//Enter comments, if needed.
9//Review your information. If it's correct click Save.
10//Repeat for other meetings.

*Remember to count ALL attendees, both members and nonmembers.

*If needed, you can create other meetings, such as church board meetings, etc.

HOW TO

make basic edits and updates for members and nonmembers

1//Go to People tab, select Advanced Search in sub menu.
2//Enter last name and first name.
3//Click Search.
4//Hover over the desired name with cursor and click.
5//Check the name at the top of the screen to verify that you have the correct account open.
6//Click on the gray tab "Edit Person."
7//Make any needed changes (i.e. address, phone number marital status, date of birth, change for promo mail, etc).
8//Click Save.

Note: *if no changes were made you will need to click "Cancel."*

HOW TO

transition from current clerk, YOU, to a new church clerk

1//Please alert your conference membership clerk that you are relinquishing your clerk duties and when.

2//Your access code to eAdventist.net will be deactivated on that date. *Sharing and passing on access codes and passwords is not acceptable.*

3//Encourage your nominating committee to choose a new clerk with computer skills, however, this is not a requirement.

4//Make sure the new clerk has alerted the conference membership clerk so that training may begin. I will need his/her email address so I can communicate with them. Transfers will now be sent to the new clerk.

*Thank you in advance for your excellent and dedicated time, effort and skill. You are much appreciated and I will miss you!

HOW TO

tips and resources

*When using Advanced Search, if you're not able to find the name of a person, try entering just the first three letters of the last name and the first three letters of the first name. In the computer search world, less is more.

*Each person's account has history. The history of their baptism, marital name changes, address changes, etc. **NEVER swap names on accounts.**

*While waiting for a transfer DO NOT start a new account for the person being transferred. When their transfer is granted the account will be sent over (with all their history). *This includes a pastor.*

*Training videos for basic clerk functions can be found at www.rmcsda.org/eadventist-training-videos

HOW TO

grant a transfer - *out*

1//Online clerks will receive an email notification for a transfer request *out* of their church.
2//Go to People tab, select Transfers in sub menu.
3//To view the transfer request, click on the tab "To Grant."
4//Take the name of the member requesting to transfer *out* to the church board for notification.
5//Following the board meeting, for two weeks announce or publish the name of the member transferring out.
6//The date of the 2nd announcement or publication is the "Date Granted."
7//Again, go to People tab, select Transfers in sub menu. Click on the "To Grant" tab.
8//Click on "View" next to the member you are granting a transfer out.
7//Click on the gray "Grant/Deny" tab.
Note: *The system will look for someone in your church with a matching name. If it does not find a match then check the spelling or check the membership list to confirm their membership is in your church.*
8//Select the correct person by clicking on the **dot** next to their name. Click on "Select."
9//Add date the member was voted out. *Refer to #6.*
10//Click "SAVE."

Your part is now done and you will wait for the other church to Accept the membership transfer. **Remember:** *until the member is Accepted into the other church they will stay on your membership list.*

HOW TO

accept a transfer - *in*

1//Go to People tab, select Transfers in sub menu.
2//Click on the tab "To Accept."
3//Take the name of the person transferring *in* to the church board for notification. Then announce or publish for two weeks. The date of the second announcement is the "To Accept" date.
4//Again, go to People tab, select Transfers in sub menu.
5//Click on the tab "To Accept."
6//Click on "view" next to the person transferring in.
7//Click on the gray tab "Accept/Decline."
8//There will be an automatic checked dot next to the word "Accepted." Enter the date voted. *Refer to #3.*
9//Click "Save."

Click on the "Completed Tab" to see the member that has been added into your church.