



www.ChurchMemberLink.com

Web-based Church Membership & Management Software

Document Revision: August 2018

WELCOME TO CAA!

Thank you for purchasing a **MemberLink®** user license for your church!

Outlined in this document are the setup processes and timelines CAA follows for new church customers. Our step-by-step approach keeps you notified and ensures quick activation of your system.

As you read this document, we assume that you have already participated in an overview presentation or demo of MemberLink®. You would have done so as part of your evaluation prior to your purchase.

Herein we also outline the support services CAA provides to assist your church in getting started with our Internet-based systems.

CAA Ministries provides installation, setup, and training at no additional cost. Services identified in this document are included with your monthly or annual user license payment if you choose to take advantage of them.

Installation Process

After CAA is notified of your purchase of a user license, we begin the installation process. It takes approximately two business days to install your MemberLink® environment on our secure servers. There is nothing to install on your personal or church computers.

1. We receive notice that you have obtained a user license.
2. We install the MemberLink® Administrative and Member modules.
3. We enter information into your MemberLink® system configuration file for your designated representative, known as the MemberLink® system Master Administrator. See an additional note about Administrators at the end of this section.



4. We email the Username, Password, and URL for the login page to the Master Administrator. (Note: we attempt to accomplish Steps 2, 3, and 4 within two business days of having received your payment.)
5. We initiate our MemberLink® "setup process" which is described in another section of this document. (This allows you to proceed with MemberLink® immediately, without waiting on the installation of the other products.)
6. We install the OutreachLink® and SchedulerLink® modules after we install MemberLink®. Typically, we accomplish this within a week of having installed MemberLink®.
7. We enter information into your OutreachLink® and SchedulerLink® configuration files for your designated representative (known as the OutreachLink® Master Administrator and the SchedulerLink® Master Administrator).
8. We email the Username, Password, and URL for the login pages to the OutreachLink® and SchedulerLink® Master Administrators.
9. We contact you to schedule an overview presentation of OutreachLink® and SchedulerLink® at your convenience.

Note: While you may have only one Master Administrator, you may designate as many people as needed with the "Administrator" permission level and capability. We refer to these people as the MemberLink® system Admins. Levels of Administrators include the SysAdmin, Admin, AssocAdmin and the AssistAdmin. Refer to the "Permission Levels Guide" for definitions of every security level.



Setup Process

MemberLink® incorporates into the database certain data fields that come standard with the system, plus, optional data fields known as "Custom Data Fields." Any person with MasterAdmin, SysAdmin, or Admin permissions may create these fields when needed to "customize" the database to fit your church's specific data requirements.

CAA is pleased to assist with initial customization for your church to help you start using MemberLink® as quickly as possible.

- 1. We create Custom Data Fields for you that many churches typically find useful. Later, if you decide you do not need them, it is simple to delete them.**
- 2. We ask that your MemberLink® Administrator send us a spreadsheet containing your contact records. Each person must be in a separate row in the spreadsheet. For example, Mr. and Mrs. John & Nancy Smith cannot share the same row or contact record. We need one row or record for John Smith, and a separate row or record for Nancy Smith. Complete instructions are included in the spreadsheet template we send to you to review or use.**

Note: MemberLink® creates and maintains a separate contact record in the database for each person. This allows you to have different last names, mailing addresses, phone numbers, email addresses, etc., for members of the same family.

- 3. Upon receipt of your church's spreadsheet, we will convert your data for you:**
 - a. We will map your spreadsheet data columns to the MemberLink® database structure.**
 - b. We will create Custom Data Fields for you in MemberLink® for any of your data columns that do not fit into standard fields. All your old data is preserved and converted for you.**
 - c. We will perform the Import function for you, bringing all your records into the MemberLink® database so that you will not have to enter each person into the system one at a time.**



Note: If your church has been using another membership system, most have an “export” function that will create a spreadsheet for your current data. After you create it, please examine it and make sure it follows the instructions in the spreadsheet template we provide to you before submitting it to us. Also delete any columns that you do not wish to maintain and bring forward into your new MemberLink® system. Any columns of data we find, we map and convert!

4. We typically have the Custom Data Fields created and the Import function completed within 2-3 business days of receipt of your spreadsheet.

Note: Your MasterAdmin or SysAdmin is welcome to create the Custom Data Fields and perform the Import without our assistance. We offer to do it for your church not because it is difficult to do, but because we do it all the time and can usually get it done more quickly. Many churches find it to be a more seamless and painless conversion when your own staff or volunteers do not have to perform these tasks.

5. We offer the opportunity for your MasterAdmin or SysAdmin to send us a list of your committees or leadership teams, names of your Sunday School or Small Group classes, etc. If you do, we will create the initial groups, organizational structures, and supporting Custom Data Fields to help get you going more quickly.

Note: Your system Administrators are welcome to perform all the setup and conversion without our assistance—but we can shorten the learning curve if you let us help!

6. After MemberLink® is up and performing well for your church, we stand ready to assist with setup and training when you are ready to begin using OutreachLink® and SchedulerLink®.



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Training Process

CAA Ministries offers product training all along the way. We schedule and host Web Meetings at your convenience.

- We can work one-on-one with your Administrator in a "train the trainer" approach.
- Alternatively, you can involve as many of your church staff and system Administrators as you want when we provide group instruction sessions.
- "Students" can connect to the Web Meetings from any location where they have high-speed Internet and a desktop or laptop computer.

In addition to the Web Meetings, there are Help Buttons all throughout the system. They are **blue circles** with a ? in the center and look like this:



You can click on them to find explanations, instructions, and training. They provide overviews of screens and details of system functions. We eliminated the need for 200-page user manuals that are difficult to read and cumbersome to print and distribute. Now you can click a Help Button right where you need to read about the area you want to use.

Resource Materials

CAA Ministries offers a variety of materials for you to read or download and disseminate to your church staff and system Administrators.

Product brochures for MemberLink®, OutreachLink®, SchedulerLink® and other products are available at this web page:

www.ChurchMemberLink.com