

The following document outlines all of the new features and changes coming to Church Social in the upcoming redesign.

### Ground-up redesign

The current design is over eight years old and is certainly starting to show its age. This new design is modern, clean, and fully responsive, meaning it looks great on desktops, laptops, tablets and phones. The site layout and navigation has changed pretty significantly, and while this will take some getting used to, we feel it's much more simple. Basically all the app features are now one-click away in the main navigation.

### Groups

Groups have easily been the most requested feature since day one. Not only are they new in the redesign, but they've actually become an integral part of the app. Groups allow you to message one-another, share documents, create schedules and share group information, and we have more things planned. Here are the types of groups you can create:

- Bible Studies
- Clubs
- Committees
- Mailing Lists
- Office Bearers
- Small Groups
- Wards/Districts

Anyone in the congregation is able to create groups (other than ward and office bearer groups, which must be done by the administrators). When you create a group, you become the administrator of that group, allowing you to edit the group settings, as well as add and remove members.

There are two types of groups: open groups and invite-only groups. Open groups will be things like bible studies, clubs, and mailing lists, which anyone can join, or leave. Invite-only groups, on the other hand, are closed, and members must be invited by the group administrator. This is ideal for committees and small groups.

### Messages

Our emailer is by far the most popular feature in Church Social. We send hundreds of thousands of emails each month between all our customers. However, there are some challenges with it. Members can easily get email message overload, especially in larger congregations. There is also no way to have group discussions—messages are very much one-way. Further, if email delivery ever fails (which it does from time to time), those messages are lost forever. We wanted to do better!

In the new Church Social the emailer has been renamed to “messages”. All messages are saved within the app, meaning members experiencing issues with email delivery can always find a copy by logging into Church Social. From within the app members can also reply to group messages, making discussions within committees or clubs really easy. And most importantly, members can reduce the amount of messages they receive by subscribing only to the groups that interest them. In fact, members can completely disable email notifications and still read all their messages within the app.

We’ve always been extremely hesitant about introducing yet another messaging app to our users. For this reason the new messages feature will continue to work great via email. This is especially important for those members who enjoy receiving email communications but don’t log into the app frequently.

## **Member directory**

The member directory has been given a face-lift and a few new bells and whistles as well. You can still view the member directory in the classic card view, but we’ve also added a new list view, which is great as a quick contact information reference. We’ve even added a new map view, which shows all the families positioned on a map. It’s pretty neat to see! Further, we’ve added a new church setting for your church address. When set, we place your church location on the map as well.

The family page also includes this map view and a long-requested “get directions” button. We’ve added the ability to now download vCards directly from the family page, making it easy to import members from Church Social into your contacts software. And you can also download PDF family sheets from the family page, useful for those of you who like to keep a paper copy of the member directory.

## **Files**

Another big area of improvement is the document archive, which is now called “Files”. We’ve added the ability to upload multiple files at once. The file sorting is also much more natural, acting more like a normal file system. You can now create sub folders, which is great for keeping things organized. There is also a new “trash” feature to help prevent accidental deletions. Finally, and maybe most importantly, folders now have a comprehensive permission system, allowing fine-grained control over who can see and edit a folder’s contents.

## **Schedules**

Schedules are a really useful feature, but they’ve always taken a bit to get setup. Not anymore! In addition to manually creating schedules, you can now import existing schedules from a spreadsheet.

We've also simplified schedules by removing the "member" and "family" schedule type. All schedules are now the same, and all can have members, families and groups added to them. This gives congregations tons of flexibility around how they create their schedules. For example, you can create a normal member-only schedule, such as a nursery schedule or deacon collection's schedule. Or, you can create a family schedule, such as a host family schedule. Plus, you can create new group schedules, such as a bible study meeting schedule. Or, you can even mix types, and create a home visit schedule, which includes families and office bearers (members).

Finally, as a small bonus, we've added your scheduled dates to the main calendar. This makes it nice and easy to see your upcoming scheduled events at a glance.

## Library

You can finally import library books! Many congregations with thousands of books haven't been able to take advantage of this feature, simply because of the workload it required. Searching the library has also been significantly improved. You can search by title, author, EAN or ISBN, type (book/DVD/Audio CD/etc) as well as category. Plus, in the near future, librarians will actually be able to check books out to keep track of which books members have.

## Sermons

Like the library, the sermon archive is now much easier to search. You can search by the title, bible text, author and series. Yes, we've added series! We've also added a new "authors" list, so sermon editors don't have to type in the minister's name each time they create a sermon.

Our favourite new sermon archive feature is the new "add texts" functionality when editing a sermon. Previously it was a laborious task to enter in all the bible verses. Now you can simply paste all your bible texts in, and we automatically parse and format them for you.

## Council

In the previous version of Church Social, when you assign someone as an office bearer, they were given increased access to member information. This was done in the member directory, when viewing a family. If you were an office bearer each family member had a "more information" button beside them. And while this was okay, it was sort of confusing, and many office bearers didn't even realize this button existed.

In the redesign we've created a whole new "council" section. In here office bearers are able to view reports that will help them with their important role. Reports such as special or notable dates (ie. birthdays, anniversaries, dates of loved ones deaths), membership status reports, ward lists, etc.

## Profile

The old "My Settings" page has been renamed to "Profile", and we've combined a few settings into this one page. Like before, users can update their email address and password. This is also where they can set their family photo, which was previously done from the family page. We've also given users the ability to update their own phone numbers. And finally, this is now where users can set their notification preferences, as well as manage any previous unsubscribes.

## **Live streaming**

Many congregations live stream their church services. Church Social now has a convenient way of adding that live stream to the app. Under the new church settings page, administrators can paste in their live stream embed code. Once done, a new “live stream” page will appear in the main menu.

## **Feature toggles**

Another new church setting is feature toggles, which allows churches to enable and disable certain Church Social features. For example, maybe your congregation doesn't use the library features, or maybe you're using some other service to manage your sermons. You can now hide these features from Church Social, simplifying the overall site navigation.

## **Church-wide privacy settings**

In the previous version of Church Social, administrators could set privacy settings on a per-user basis. They could hide birthdays, anniversaries or contact information. However, this had to be done on a per member basis, which was a lot of work if you wanted to apply a privacy rule to all members in the congregation. For example, maybe you wanted to hide everyone's age throughout the app. In the redesign we've made this much easier. From the church settings page you can now toggle these privacy settings church-wide.

## **Administrators & statisticians**

In the redesign the administrator and statistician roles have been merged together. There has been a lot of confusion around what the difference was between these roles. Our original goal was that administrators would be the only people in Church Social able to view all content, making changes when needed. They could also set roles for other members. The challenge was that statisticians were the ones assigning office bearer roles, and they also had the ability to set account passwords. Meaning, statisticians technically had workarounds to see all the things that administrators could. That left us with a choice: we had to either remove the ability for statisticians to manage office bearers and set passwords (essentially crippling the role), or just merge these two roles together, which is what we did in the end.

## **People searching**

Church administrators are going to love the new member management tools. From the new “people” page you can run comprehensive searches, including filters for member status, role, whether or not they have an email address, whether their email address is bouncing, login status, invitation status, baptism status, profession status, gender and more. Plus, when you run a search, and then visit a member page, and then later return back to the search page, the app remembers your previous search!

## **People and family editing**

The edit member and family pages have changed quite significantly. In the previous version of Church Social there were literally 11 different pages for editing a member or family. We've simplified this down to one page! You can view all the member's information from one place, and click "edit" beside each item to make changes. Further, we show the member's family on the right hand side of the page, making it really easy to jump between members of a family. And, speaking of families, you no longer have to create them! Every member is in a family by default, and now you simply add and remove members from existing families. You can even bulk edit family members, more on that below!

## **Bulk editing**

We are really excited about the new bulk editing tool we've added in the redesign. Administrators can now choose members from a search and then bulk edit them. This makes it extremely easy to make bulk edits to your member data. The tool itself looks a lot like a spreadsheet, which makes it easy to compare data and find inconsistencies.

## **Notes**

In the previous version of Church Social, administrators have the ability to set two types of notes for a member: "notes for the statistician" and "notes for the office bearers". The latter has caused a lot of confusion. Many churches think this is a tool for office bearers to record member notes. This is not the case. It was simply intended as a way for statisticians to share extra information about members with office bearers. In the redesigned we've simplified this down to a single notes field. Any existing notes (from either field), have been combined into this new field.

## **Wards and office bearers**

Administrators: take note that wards and districts are now managed under groups. Only administrators are able to edit ward and office bearer groups. When you edit a ward, you'll be able to assign which office bearers are responsible for that ward. On the member side, you can set the office bearer role from the edit member page. You also set the family's ward from the member edit page. You can even assign more than one ward to a family, which is a long wanted feature for a few congregations.

Also take note that we've added a new church setting for the name of your pastoral groups. You can choose between the labels "ward" and "districts".

## **Report builder**

Reporting has been a challenge since day one. While Church Social provides a wide range of reports, we've come to realize that every church likes to do things just a little bit different. In the redesign we've added a brand new report builder. This allows churches to create almost any report they want from their membership data. They can then view those reports directly in the app, download them as PDFs, or even export them to a spreadsheet.

For even more customized control over the reports, we've also added the ability to generate reports from custom SQL queries. We essentially provide congregations with a sand-boxed SQLite database, prepopulated with their data.