Direct Communicator

A Product of CAA Software, Inc.

Direct Communicator Administrator User Manual

Using Direct Communicator with
Sunday School, Small Group & Other Church Ministries

PREPARED FOR: NEIGHBORHOOD BAPTIST CHURCH

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Table of Contents

Administrator Manual Overview

Direct Communicator is a web-based contact management and communications tool. It provides several methods of communication for Administrators as they share and exchange information with Members of groups. Examples of "groups" include ministry teams; Sunday School classes; discipleship or Bible study classes; small groups; youth or children's groups; mission teams; deacons; church committees; and ministerial or office staff. The entire congregation could be a group. Church prospects could be group.

Direct Communicator is comprised primarily of two modules—an Administrator module and a Member or user module. Set-up parameters, governance, access permissions, group structure and organization, and daily oversight of content are provided in the Administrator module.

Anyone granted the appropriate "permissions" can logon to the Administrator module and perform administrative functions. Such permissions are normally reserved for the group's leader or leaders, rather than the larger body of participants known as "Members" of the team, group, or church. However, leaders may assign administrative responsibilities to any Member that will assist them in the Administrator role.

This *Administrator User Manual* is provided for those who will function in the role of *Direct Communicator* Administrator at a typical church. A separate user manual is available for the Members who will be logging into the Member module at a typical church.

In this *Administrator User Manual*, some of the examples shown may be taken from actual churches using *Direct Communicator*. Some of the examples will depict usage for Sunday School classes, but remember the concepts are applicable to just about any "group" of people involved with a local church.

In this *Administrator User Manual*, the naming conventions shown in the following chart will apply:

Term	Meaning
D-C	Short abbreviation for *Direct Communicator*.
Neighborhood	Name in this manual of the church using **D-C**.
Member	Anyone who has registered to use this church's **D-C** and has been granted Member privileges or "permissions". Members typically do not have "Administrator" permission settings and cannot logon to the Administrator module. Note: "Members" refers to this **D-C** tool and can also be church prospects as well as church members.
Admin	Any registered member of this **D-C** tool who has also been granted Administrator privileges or "permissions". This could be anyone who assists church or group leaders with this role. There can be as many Admins as deemed desirable, and they can logon to both the Administrator module and the Member module.
CAA	Short abbreviation for CAA Software, Inc., owners of CAA Ministries and CAA products such as: • *Direct Communicator* used in church growth strategies for managing groups and communicating with them via e-mail, mass texting, automated phone messaging, and website posts. • *Outreach Connect* used in church growth strategies for helping churches track and manage prospects and members with outreach teams via the Internet. • *Prayer & Harvest Campaign* used in church growth strategies for helping churches locate, pray for and invite unchurched families in the community. • **Sun Dial Online Calendar** used in church growth strategies for helping churches with online scheduling, facilities management, and event registration and payments. • **Eagle-Wings Engagement** used in church growth strategies for helping churches with condition and needs assessments and a package of tools and consulting services.

Advantages of *D-C* vs. E-Mail & Social Network Solutions

Direct Communicator is an ideal tool for ministers, staff and group leaders at Neighborhood church to stay in touch with their workers, volunteers or group members. *D-C* takes advantage of the Internet to help leadership create and manage your Neighborhood membership database and efficiently distribute news and important announcements to Members. Neighborhood families can be kept informed via the Internet no matter where they are—at home, at school, at work, at church, or even while they are traveling around the state or country.

Direct Communicator enables Neighborhood's *D-C* Admins to quickly and easily update Neighborhood *D-C* Members in a variety of ways—with a single tool. Admins maintain contact information for each Member, but Members may update their own profiles to assist in keeping contact information current. Admins create and maintain group lists to control distribution of messages for targeting specific Members or groups of Members.

Direct Communicator has privacy features you will really appreciate. Unlike the typical social web-based applications, Members connect without any annoying popups or unwanted advertising. Also, there are no private chats that have been known to complicate family relationships. There are no addictive social games that may rob your time. Just as importantly, there are no "strangers" using *D-C*. Outsiders cannot gain access and attempt to "become friends" with Neighborhood youth or children in hopes of fostering unhealthy relationships.

Make no mistake about it—*Direct Communicator* is much more than just an ordinary e-mail system.

- *D-C* facilitates leadership communication through Admins to Member groups in all of these ways: e-mailing, mass texting, automated phone messaging, and file sharing; and with an electronic bulletin board for sharing news, announcements, schedules, important data, photos, websites links—and even post-it notes!

- Members may maintain their own contact profile, respond to surveys initiated by an Admin, and reply to Admin or Member postings on the "Comment Wall".

- Members may review important news and data posted on the electronic bulletin board—called a message board, and download files (forms, newsletters, PDF's, spreadsheets, presentation slides, etc.) from an Internet storage area assigned exclusively to Neighborhood church.

- *D-C* is entirely Internet-based—no need for your church to have its own IT professionals or to maintain servers, websites and databases. There is no software to install on Admin or Member personal computers or laptops.

- Admins logon from home, office, church, or even while traveling and choose to communicate using whatever method seems easiest or most appropriate to them. Members may logon from home, school, office or wherever they have Internet access.

- Members receive e-mail messages using whatever e-mail solution they currently use, or text messages using whatever carrier they currently use—*Direct Communicator* handles the transitions between e-mail and texting providers automatically!

Finally, a separate "executive module" is available. It supports automatic connectivity between *Direct Communicator* modules linked in a hierarchical structure. For example, your Baptist state convention Sunday School department could use a *D-C* executive module at the state convention office to connect seamlessly with affiliated churches that are also using *Direct Communicator* with Sunday School leadership and classes at their church.

If you want to explore how you could take advantage of the "no cost" executive module to connect with other copies of *D-C* (multiple *D-C* setups within a single church, for example), contact your representative at CAA Ministries, a division of CAA Software, Inc.

Supplemental Materials

At the end of this *Administrator User Manual* there is a Supplemental section with helpful information and assistance.

Supplemental Section "A": For an overview of how to easily find the Administrator and Member login screens, please refer to **Section "A"**. Also provided in **Section "A"** is a thorough explanation of the logon process.

Supplemental Section "B": For a more detailed comparison of *D-C* features versus other popular communication solutions, please refer to **Section "B"**.

Supplemental Section "C": For an overview of *D-C* pricing options, please refer to **Section "C"**.

Supplemental Section "D": For an explanation of the Master Configuration options, please refer to **Section "D"**.

Using Direct Communicator—Neighborhood Admins

The purpose of this manual is to assist you in learning to use *Direct Communicator*. It will also serve as a handy reference source for you. In the following pages, we will show you several administrative functions and step through their intended usage. These are administrative functions—only those registered Members designated with Admin permissions may perform these functions.

Assistant Administrator permissions are also available and will be described in more detail below. While Assistant Admins can logon to the administrative module, they do not have complete access to all administrative functions.

Admin Logon

To access the administrator functions, Admins must logon via the Administrator Login screen. Please refer to **Section "A"** in this manual for more information about accessing the login screen.

At least one registered Member from Neighborhood must be designated as a *D-C* Admin. Any number of Members with Admin or Assistant Admin permissions may use the Admin Login screen and perform the Admin role and functions.

Admins: Enter your Username and Password and click the *Start* button as shown in the example graphic.

After logging in, many of the administrative functions are accessible through the **Icon Buttons** similar to those shown in the following example graphic.

Manage Bulletin Board
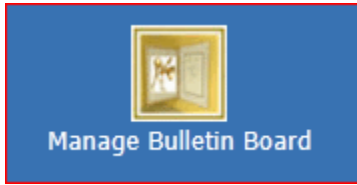
When you click this button, you will go to the message board, also called an "electronic bulletin board". You will be placed into "edit" mode so that you can make changes to the bulletin board. Note: The functionality to change the bulletin board is restricted to Admins only; Assistant Admins do not have "permissions" to update the message board although there are other administrative functions they can perform.

The message board (electronic bulletin board) is actually a website page. Admins can post pictures, stories, announcements, news, and even hotlinks to other websites. You can control the font sizes and colors and develop your message board into a functional, attractive way to keep your news and information in front of your Members.

If you are a web programmer, you can even do your own HTML coding to produce a more unique, customized message board designed exclusively for your church or group.

An example of a bulletin board in "edit mode" is shown in the graphic below.
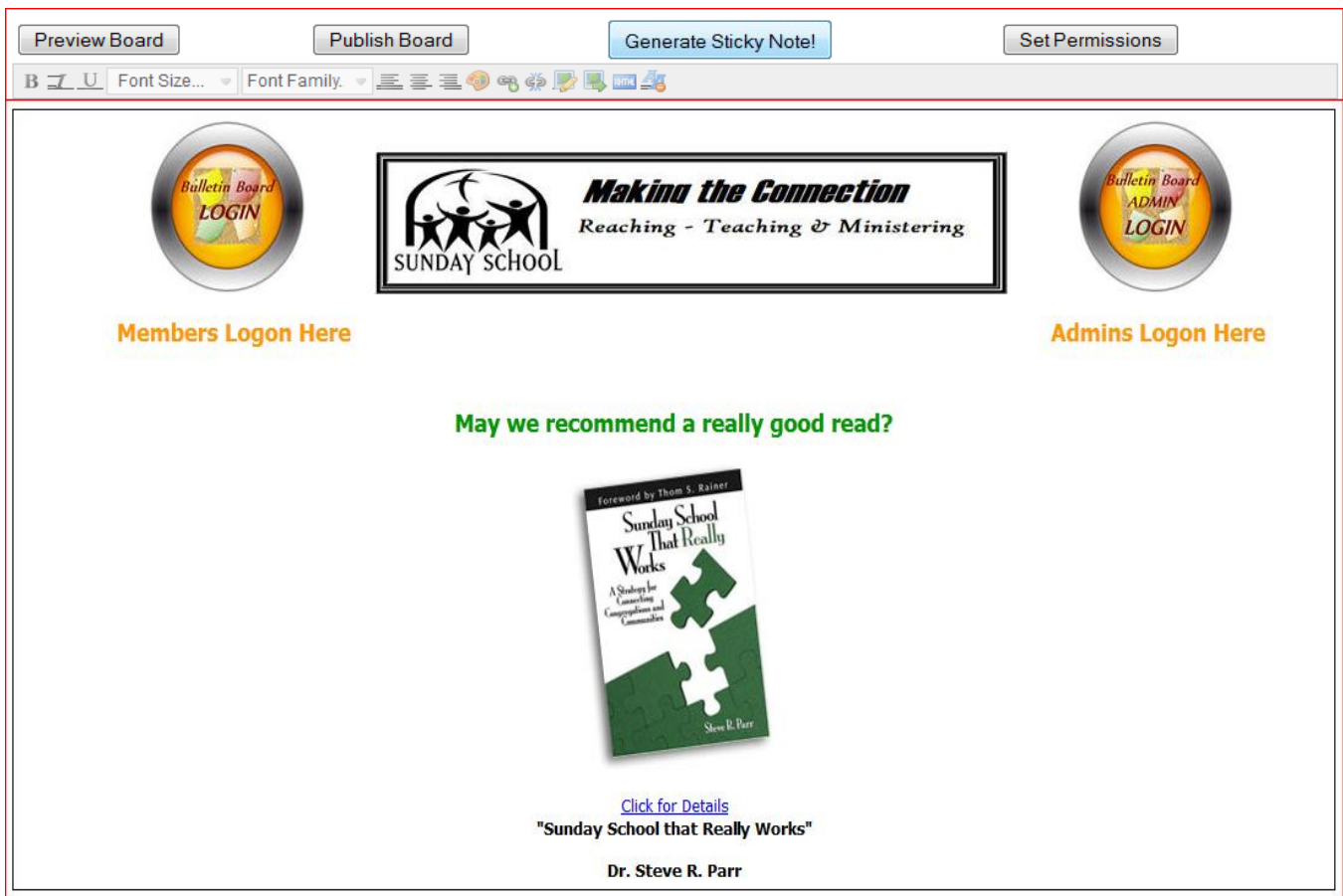
Preview Board After making changes to the message board, you may click the **Preview Board** button to see what the revised web page will look like. If you don't like the changes, you may return to the edit mode by clicking the **Back** button and then make additional changes. If you like the changes, you may click the **Publish** button and make the changes permanent. Note: If you click the **Back** button and then the **Back to Main** button, you will exit out of the edit mode without saving your changes—in effect returning to the previous bulletin board view without making any changes.

Publish Board Clicking the **Publish Board** button has the effect of "saving" your work. It makes "permanent" any message board updates you made. The instant after the message board becomes "permanent", anyone coming via the Internet to view it will see the changes you just applied. Note: If you click the **Back to Main** button, you will exit out of the edit mode without saving your changes. You must "Publish" your work before going "Back to Main" or your changes will not be saved.

Generate Sticky Note! Clicking the **Generate Sticky Note** button takes you into the functionality for building "post-it notes". After you create and save a Sticky Note, you can place it on your web page (electronic bulletin board). When you create a Sticky Note, you will save it in a folder of your choosing on your computer or thumb drive and then insert it from there onto the message board. Remember to "Publish" after you insert it and complete your changes.

Set Permissions Clicking the **Set Permissions** button will let you specify who can see the message board—the general public or only registered Members. Please select what permissions a Member must have to view your Bulletin Board, by clicking on the appropriate checkboxes. The following are your choices:

☐ **Everyone** —general public: anyone who visits this web domain URL (web page)

☐ **Regular User** —only a registered Member of your **Direct Communicator** system

☐ **Administrator** —permission levels support performing all administrator functions

☐ **Assistant Admin** —cannot do bulletin board, user permissions, or custom buttons

☐ **Staff** —special designation, but only with "Regular User" permissions

☐ **Special User** —special designation, but only with "Regular User" permissions

Note: Typically you would check either "Everyone" or "Regular User". If you want the general public to be able to view your bulletin board, check "Everyone". This has the added advantage of allowing Members to come to the site and logon using the special buttons on the message board (shown at the top of the graphic on the previous page). If you check Regular User, no one can come directly to your message board. Members will have to go directly to the Admin Login screen or Member Login screen and logon before they can see the message board.
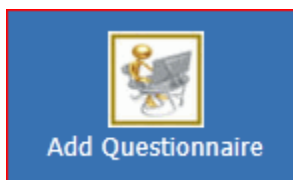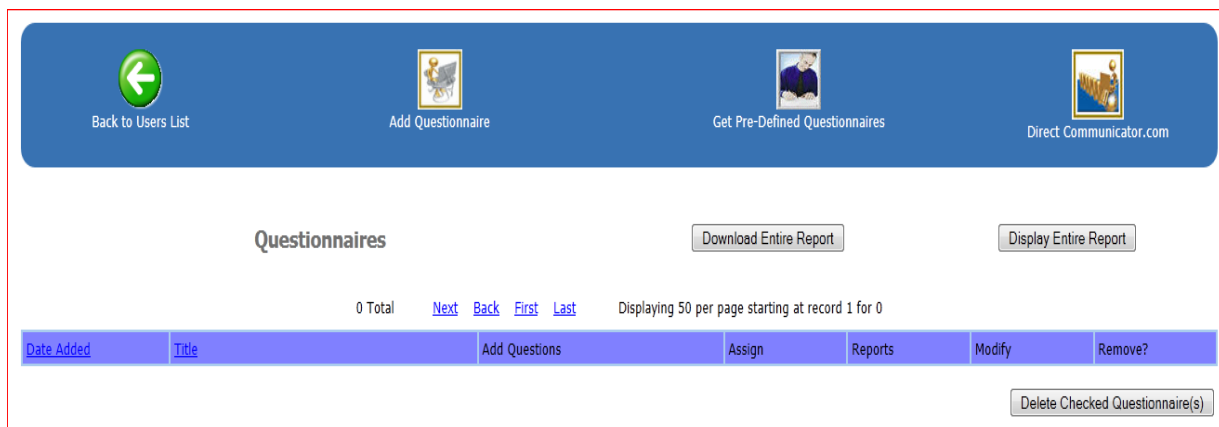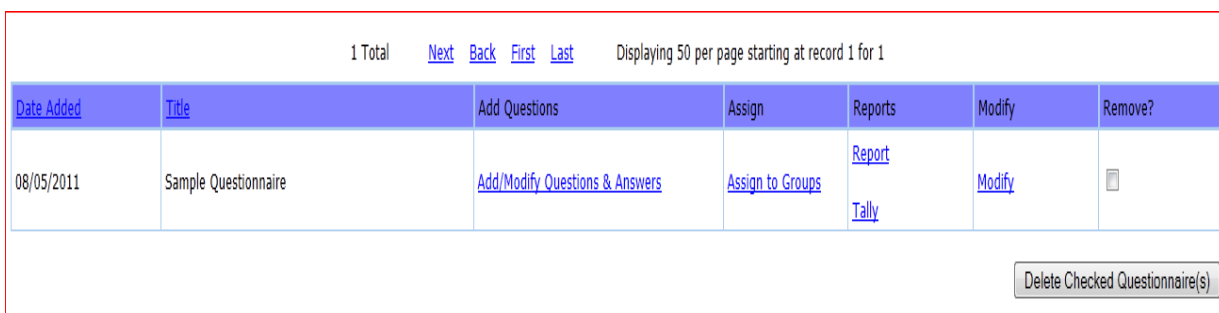
Manage Questionnaires
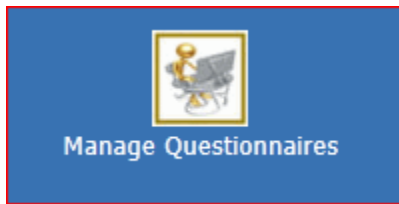
The questionnaires function enables the Admins to create surveys in the form of questionnaires. The surveys can be assigned to specific groups or to all Members to answer.

When they logon, Members will see they have questionnaires to respond to and then can answer the questions. The Admins have a "tally" function to help them determine the results from the completed questionnaires.

The following example graphic shows no questionnaires have been created yet.

	Back to Users List	Add Questionnaire	Get Pre-Defined Questionnaires	Direct Communicator.com

Questionnaires [Download Entire Report] [Display Entire Report]

0 Total   Next Back First Last   Displaying 50 per page starting at record 1 for 0

Date Added	Title		Add Questions	Assign	Reports	Modify	Remove?

[Delete Checked Questionnaire(s)]

To create a questionnaire, click the **_Add Questionnaire_** button. You will be prompted to put in a brief Title and a Description of the questionnaire (such as intended audience, purpose, etc.). After entering the Title and Description, click the **_Add Questionnaire_** button at the bottom of that screen. The questionnaire will now appear on the list as shown in this next example below (name "Sample Questionnaire" in Title column).

1 Total   Next Back First Last   Displaying 50 per page starting at record 1 for 1

Date Added	Title	Add Questions	Assign	Reports	Modify	Remove?
08/05/2011	Sample Questionnaire	Add/Modify Questions & Answers	Assign to Groups	Report Tally	Modify	☐

[Delete Checked Questionnaire(s)]

To add questions to a questionnaire, click the *Add/Modify Questions & Answers* link for that questionnaire. That link is shown in the Add Questions column in the example graphic on the previous page. Clicking that link will take you to the Add Questions screen. An example graphic of that screen is shown below.

Leader-Administrators may control who receives the questionnaire by clicking the *Assign to Groups* link in the Assign column (shown in the example on the previous page). This lets you select one or more specific groups to receive the questionnaire, or of course it can go to "No Group" – everyone, all registered Members.

The example graphic below shows that our "Sample Questionnaire" already has one question: "Do you understand how to create a questionnaire?" It is a "Yes/No" question only; no text response box has been included for this question.

To change a question, you would click the *Modify* link for that question. It is found in the Modify column and can be seen in the example graphic below.

Question	Appearance	Sort	Posted On	Modify	Remove?
Do you understand how to create a questionnaire?	Yes/No	0	08/05/2011	Modify	
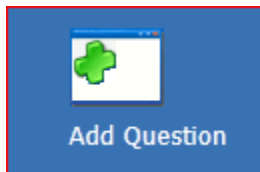
To add additional questions, click the **Add Question** button. You will be prompted to enter the question text and specify whether it is a Yes/No question, a Text Box question, or "both" of these choices as shown in the example graphic below.

Use the **Add Question** button to add as many questions to the questionnaire as you want it to contain. When you finish, all the questions will be listed on the screen in the order you entered them.

If you want to change the order of the questions before presentation of the questionnaire to your Members, enter a value (1, 2, 3, etc.,) in the Sort column for each question. Then click the **Sort** button at the bottom of the list of questions. "Sort" will let you specify what order to present the questions inside the questionnaire—you control the presentation sequence because often it will be different from the order in which you created the questions.

To see the **Sort** button, refer to the example graphic on the previous page. It is on the last line, just below the Sort column.

E-mail & Text Messaging
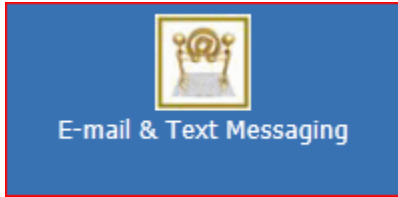
The E-mail & Text Messaging function offers two very powerful tools enabling leadership (through Admins and those with Assistant Admin permissions) to send messages via either e-mail or cell phone texting to individual members, groups, or all members simultaneously. One message can be created and sent via e-mail—and with the click of a single button, you can switch to texting and send the same message to your members' mobile phones. In the Member profile, there is a place to record the Member's cell phone number and their carrier so that texting is possible.

Upon arriving at the E-Mail & Text Messaging screen (similar to the example graphic shown below), the first order of business is to create the distribution list.

Select/Search: If you want to set a filter using the Select/Search feature, click the *Select/Search* button. In the example graphic below, the *Select/Search* button is on the right side.

You will be able to establish a filter for last name, zip code, or any of the filter options available on that screen. After entering your filter choices, click the *Select By Above Criteria* button near the bottom.

Group Menu: The more typical way to build an effective distribution list is to use the *Choose a Group* pull-down menu. "All" is the default, and if left at that setting, all Members in your **D-C** database will be on the distribution list to receive the e-mail or text message. In the sample graphic below, "All" is shown just above the *Select Group* button.

If you click the pull-down menu, you will see the groups you have already created. You may select any of these groups, and then only the Members of that group will receive the e-mail or text message.

In the example graphic shown below, a group was chosen from the pull-down menu and then the *Select Group* button was clicked. The Members in that group (a Sunday School class named Homebuilders) are now displayed for the Admin to review. Individual Members of this group may be omitted from the message by unchecking the box next to their name. That will not remove them from the group, but it will tell the message system that even though they are in the group, only the "checked" members should be sent the message.

The default is E-mail. At the bottom of the screen, there is a toggle button. With e-mail selected, the button will say "*Switch to Text Messaging*". Use that button to toggle between sending via e-mail and sending via text messaging to the distribution list.
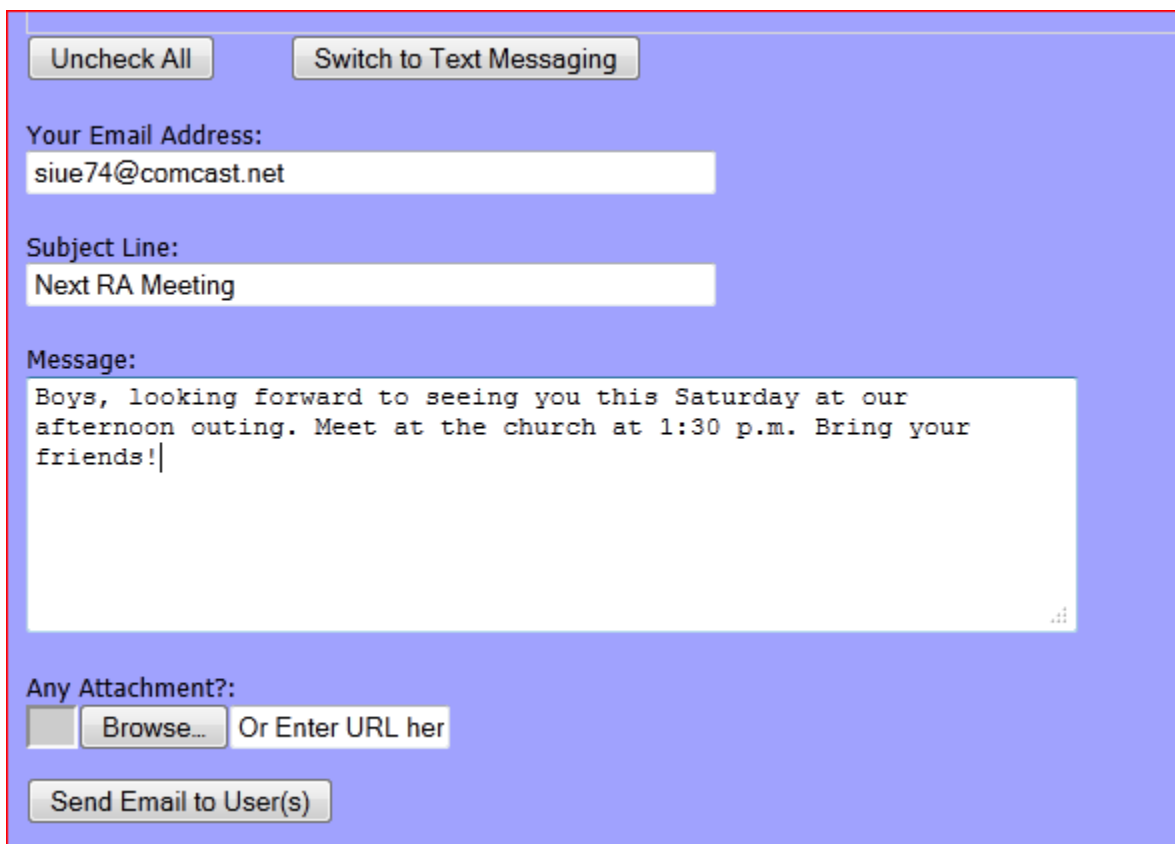
www.DirectCommunicator.com

Below the E-Mail/Texting message toggle button, you will find the area of the screen where you build the actual message. Remember, thus far you have only built your distribution list.

The first box lets you enter the e-mail address that you want to appear as the person who is sending the message. Although it says whatever is "Your Email Address"—it defaults to the logon person—you can override it and put in any e-mail address desired.

Second, you input the brief subject of the message, using the Subject Line text box.

Third, you input the text of the message into the Message box. You may "cut-and-paste" text from other sources into this text box—such as from a Word document—but you cannot insert pictures or links. It is a text-only box.

Lastly, before you click the *Send Email to Users* button, you can attach documents to this message just like with any other e-mail system. Just click the Browse button and select the document you want to attach. It can be a Word document, digital photo, spreadsheet, PowerPoint presentation, etc.

Remember, to also send the same message as a text message, just click the *Switch to Text Messaging* button and then you can send it out again to all those on the distribution list that have texting information in their personal profile.

Phone & Voice Messaging
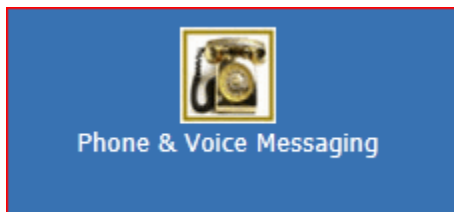
Click this button if you want to link out to a vendor that offers and supports "phone tree" automated telephone calling for you. CAA has negotiated a discounted price of 4 cents per completed call for this service. If you use this feature, you pay the fee to the Phonevite vendor each time you use their service. Note: you will be charged only for "completed calls"—a person or an answering machine answered the call. If the phone number has been disconnected or is out of service, you are not charged for that call.

Referring to the example graphic below, first build the telephone list of Members you want to contact. Use the pull-down menu to select your target group, and then click the *Download Group* button to create the distribution list for Phonevite.

Second, click the *Login/Phonevite* button. This links you out to the Phonevite vendor website where all the rest of the activity occurs.

- Set up an account with the vendor.
- Record your two-minute voice message.
- Specify the date and time for calling to commence.
- Launch the process—Phonevite will use the distribution file you downloaded and on the date you specified, make the phone calls and play your pre-recorded message.

Note: Set up an account and perform a trial test of a few calls in advance—be certain everything is working before your first important, actual usage date approaches.

www.DirectCommunicator.com

Manage Groups

Click this button to access the functionality that creates and maintains specific groupings of Members. Groups are handy ways of establishing distribution lists for e-mails, texting, and sending questionnaires. Admins can communicate with all the Members, or target their communications to specific Members through groupings of Members.

After clicking the **Manage Groups** button, a screen similar to the example graphic below will appear. In this example, **D-C** is being used by a Royal Ambassador chapter and groups include Challengers, Crusaders, leaders, parents, etc. In other uses, groups could be Sunday School classes, small groups, church committees, ministers, office staff, deacons, choir groups, and many others.

Group Name	Add Group Members	Manage Group Members	Modify	Remove?
Challengers	Add Group Members	Manage Group Members	Modify	☐
Challengers Leaders	Add Group Members	Manage Group Members	Modify	☐
Challengers Parents	Add Group Members	Manage Group Members	Modify	☐
Crusader Leaders	Add Group Members	Manage Group Members	Modify	☐
Crusader Parents	Add Group Members	Manage Group Members	Modify	☐
Crusaders	Add Group Members	Manage Group Members	Modify	☐
Lad Leaders	Add Group Members	Manage Group Members	Modify	☐
Lad Parents	Add Group Members	Manage Group Members	Modify	☐
Lads	Add Group Members	Manage Group Members	Modify	☐
RA's - All Boys	Add Group Members	Manage Group Members	Modify	☐
RA's - Leaders	Add Group Members	Manage Group Members	Modify	☐

Need more info? ⊙

11 Total   Next Back First Last   Displaying 50 per page starting at record 1 for 11

Click the **Add Group** button to name a new group.

One way to add members to a group is by clicking the **Make Group via Select/Search** button. You can use the Select/Search to set a filter and select the group Members from the Member list. Another way is with the *Add Group Members* link found in the Add Group Members column—this will be discussed in more detail below.

Click the *Modify* link if you need to change the name of the group.

If you want to delete Members from a group, click the *Manage Group Members* link to find that functionality. Note: This does not delete the registered Member from your **D-C** database; it just removes them from the group.

Another easy way to add Members to a group is with the *Add Group Members* link found in the Add Group Members column. When you click that link, you will see a screen similar to the example graphic below.
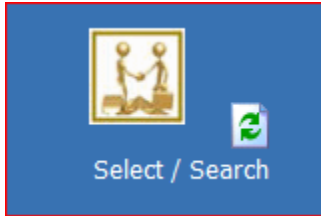
All the registered Members in the **D-C** database will be listed. You simply click the checkbox of each Member you want included in the group.

To put the changes into effect, click the **Add Checked User(s)** button at the bottom of the list.

Search / Select

When the list of Members in your **D-C** database becomes lengthy, the Select/Search feature can become a powerful tool. You can set a filter using values in any or all of the criteria categories.

When you click the *Select By Above Criteria* button, the filter will narrow the display of Members to only those matching the filter criteria that you established.

Note: The filter is removed by clicking the "*Refresh*" button. It is the little button located next to the *Select/Search* button. Another method of removing the filter and returning to the full list of Members is to click the *Select/Search* button again, and, leaving all criteria categories at their default value, click the *Select By Above Criteria* button again.

For Members in the church context, the Select/Search filter feature may not be as useful as for others. By nature of your Member families living in the same neighborhoods near the church, they also may all live in the same city and state and ZIP code. In other organizations, the list of registered Members could be hundreds or thousands of contact names, spread around the state or country—making the search filter much more powerful and necessary for them.

The example graphic below shows the typical filter criteria categories.

Custom Buttons

Your **D-C** has the capability of supporting buttons customized to fit your needs. These buttons can be added to let Admins link out to other websites. The custom buttons may be added to either the Administrator module or the Member module, or both!

Custom buttons are created and added by your CAA representative. Just contact CAA to request a custom button for your **D-C**. A couple of examples follow.

Direct Communicator Web Link

There are times when an Admin may also want to logon as a regular Member. For example, you have just updated the bulletin board and you want to see what the message board looks like to the Members or to the general public. You want to confirm that the changes on the screen look like you expect them to appear.

This **Direct Communicator.com** button has been added as a custom button and would provide a quick and easy way for an Admin to remain logged on while also logging on as a Member (without Admin permissions). Clicking the button will open a new window to the **D-C** website. From there, the Admin can click through to the regular user login screen while remaining logged on as an Admin in the previous window.
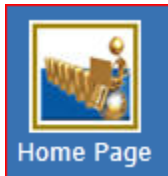
Home Page Web Link

This custom button provides a quick and easy way for an Admin to open another window and go to their church's website. This one is labeled the **Home Page** button, but you control the label name by asking CAA to give it any name you want.
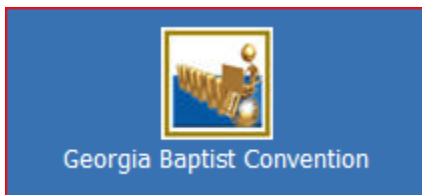
State Convention Web Link

This custom button provides a quick and easy way for an Admin to open another window and go to their Baptist state convention's website.

Other custom buttons may be created for linking out to your favorite websites. This permits your **D-C** to offer your Members convenient access to other popular websites.

Users List Functions

After logging in, as we said earlier, many of the administrative functions are accessible through the **Icon Buttons**. However, some of them are accessible through the **Users List Buttons** found right underneath the **Icon Buttons** on the screen. The following is an example graphic of what you might find in the Users List area.

Users List	Add New User		Import Users	Download User Report	Upload Files	Customize
		14 Total	Next Back First Last	Displaying 50 per page starting at record 1 for 14		

Status	Date Added	FirstName LastName	Email	Phone	View	Modify	Remove?
Verified	09/21/2011	Parent Edward Smith	Info@CBCcumming.org	999-999-9999	View	Modify	☐
Verified	09/21/2011	Parent Nancy Smith	Info@CBCcumming.org	999-999-9999	View	Modify	☐
Verified	09/21/2011	Son Robby Smth	Info@CBCcumming.org	999-999-9999	View	Modify	☐
Verified	09/21/2011	Son Jimmy Smith	Info@CBCcumming.org	999-999-9999	View	Modify	☐
Verified	09/21/2011	Son Billy Smith	Info@CBCcumming.org	999-999-9999	View	Modify	☐
Verified	09/21/2011	Parent Mike Jones	Info@CBCcumming.org	999-999-9999	View	Modify	☐
Verified	09/21/2011	Son Jim Jones	Info@CBCcumming.org	999-999-9999	View	Modify	☐

As you can see in the example above, when a Member registers, they will appear on the list. **D-C** is scalable to support hundreds or thousands of registered Members.

Registered Members will have a status of "Pending" until they or an Admin confirms they should be approved. Their status will change to a "Verified" link when the Admin clicks on the *Pending* link.

The status link is a "toggle" link—clicking it will toggle the status back and forth between pending and verified. A user's access (Admin or Member) is disabled when in the pending status, so this is a quick way to disable an individual's access to **D-C** without needing to completely delete their entire profile.

The *View* link permits viewing of some brief user profile data.

The *Modify* link permits updating the Member's profile data—any of it including the username and password.

Certain columns support the sorting of the user list. The "sortable" column headings are underlined. They are Date Added, FirstName or LastName, Email, and Phone.

The user list can be sorted alphabetically by either first name or last name for your convenience in looking for specific Member names.

The **Users List Buttons** are described in the following pages.

Users List Buttons

Add New User

Add New User   A Member can register (add themselves) from the Login screen, or an Admin can enter enough of the Member profile data to create a username and password for the Member. If the profile is incomplete, the Member can update it once the Member has logged into the Neighborhood church *D-C* system.
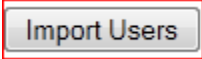
For an Admin to enter Members to the Users List, click the *Add New User* button. The Admin should see a screen similar to the example graphic at the left.

We recommend these username and password conventions (also described in **Section "A"**):

- Username = FirstLast, where the first initial of the first name and first initial of the last name are capitalized. The two names are put together, no spaces.

- Password = firstlast, where the first and last names are put together—all lower case with no spaces.

- Username & Password must be at least 4 characters long.

Note: If you want to be able to send text messages to the Member, be sure to enter the Member's cell phone number and use the Cell Phone Carrier pull-down menu to assign the user's mobile carrier. If you do not know the mobile carrier, ask the Member to update their profile and provide it.

Import Users

If the church or group has a spreadsheet containing the name and address of all Members, it could be used as a means for registering "en mass" all the Members. If you click the *Import Users* button, instructions are provided.

However, the spreadsheet may not include all of the important information about each Member that is required to take full advance of *Direct Communicator*. For example, it may not have both home and cell phone numbers, or information on what cell phone carrier is used. Mass import of users may be useful in getting started, but each profile will still have to be more fully updated either by the Member or by the Admin. Often it is just as easy to add the Members one at a time through the *Add New User* button or through Member self-registration as the Members logon the first time.

Download User Report

Click the *Download User Report* button if you want to create a spreadsheet with the Users List names and contact information. Once you have dumped all the contact data into a spreadsheet, you can use the spreadsheet as a backup file or to "slice and dice" or analyze the data in various ways.
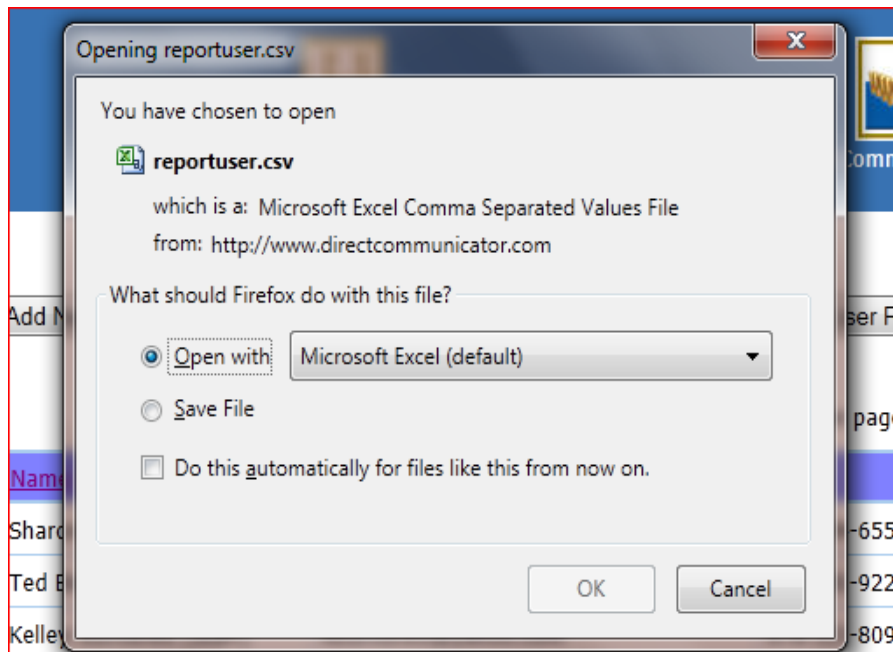
The download function creates a Microsoft CSV file (Comma Separated Values file) that can be understood and imported into an MS Excel spreadsheet.

The example graphic at the left shows the start of the process. Use the "Open with" radial button (as shown) to immediately open Excel and place the CSV file into an Excel spreadsheet. Then use the File Save function in Excel to save the spreadsheet into a folder of your own choosing on a safe computer hard disk or thumb drive.
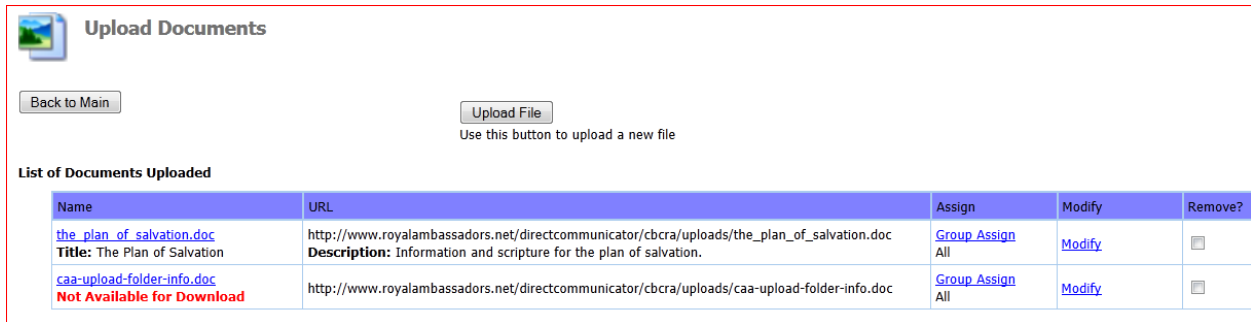
Upload Files

 Direct Communicator provides a file storage area for Admins to post files and share them with Members. You can post newsletters, instructions and forms, rules and covenants, event notices and schedules, etc. These can be Word documents, spreadsheets, PowerPoint presentations, PDF files, etc. You should not post digital pictures or music—the file size is too large.

This storage area cannot be accessed by anyone outside of your private ***D-C*** system. Only Admins can upload files into the file storage area. Members can only download files—they cannot upload files.
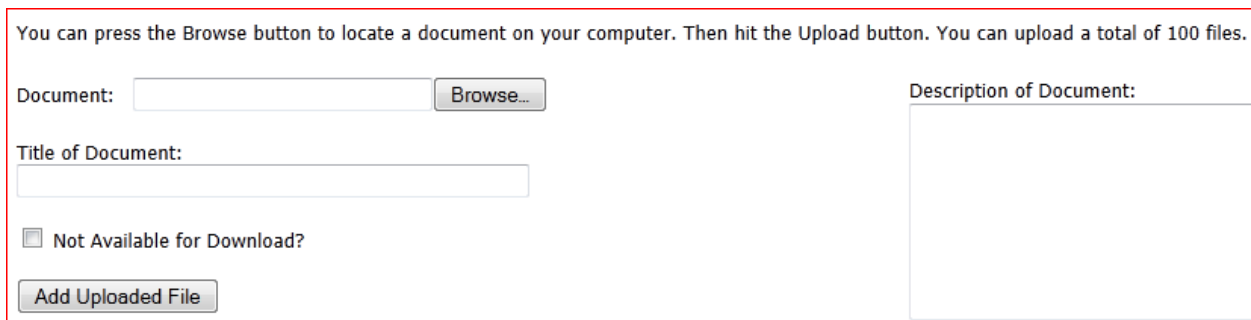
The example below is similar to what Admins will see when you click the ***Upload Files*** button. In this example, two documents have been uploaded. To open a document and view it, you would click the link in the Name column. If you want to restrict which Members may view the document, click the *Group Assign* link in the Assign column and then you can specify which groups have viewing permissions.

To upload a file, click the ***Upload File*** button shown in the example graphic above.

In the example graphic below, you will see you can Browse for the file, give it a title and description, and then upload it by clicking the ***Add Uploaded File*** button.

Customize

The **Customize** button allows the Admin to add additional information-gathering questions to the registration process. If there is any data the church or group leadership needs from the Members that is not included in the standard registration, you can add it and make it part of the registration process. When you click the **Customize** button, you will see a screen that appears similar to the example below.

To add information-gathering questions to the registration screen, click the **Add New Field** button shown in the example above.

On the screen similar to the example graphic below, you can create registration questions with either a text field for the answer or a drop-down box with pre-defined choices. You can also stipulate if an answer is required or optional, and if the data should be included in the Select/Search filter functionality.
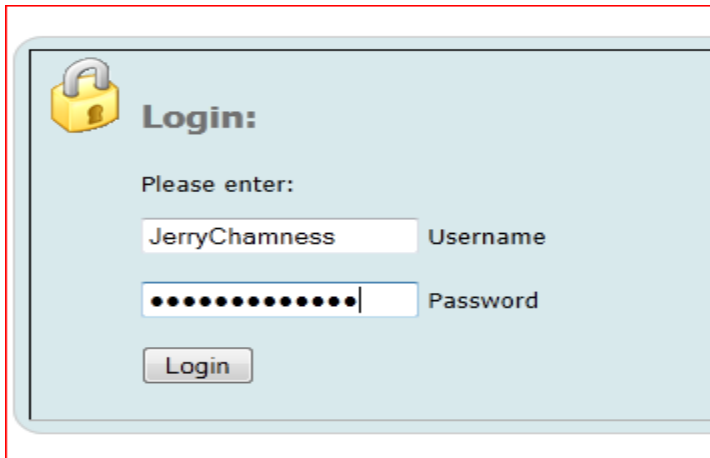
Using Direct Communicator—Members

Member Logon

To access the Member functions, you must logon via the Membership Login screen. Refer to **Section "A"** in the **Supplemental Materials** area of this manual for more information about accessing the login screen.

Members: Enter your personal Username and Password and click the *Login* button.

If you do not have a username and password yet, you may click the *Click here to register* link and create your own profile. Upon completion of your profile, you will be a registered Member and will have a Username and Password to use for logging into *D-C*.

After logging in, Member functions are accessible through the **Icon Buttons** similar to those shown in the following example graphic.

The Member logon information is presented above for the convenience of Admins that may want to logon to the Member module from time to time. As we stated at the beginning, this *Administrator User Manual* is for the Admins and a separate manual is available for the Members. Please refer to the Member manual for a complete description of the Member functions and capabilities.

Supplemental Materials

Section "A"—Accessing Direct Communicator (Logon)

Direct Communicator offers two logon options—one for Administrators and one for Members. Administrators and Members have two methods for getting to their respective login screens.

Via Browser URL

One option is to go directly to the login screen with the URL in your browser. For example, the URL's for Concord Baptist Church are as follows:

- Leadership (Administrators & Assistant Administrators) —
  http://www.gabaptist.info/directcommunicator/cbcc/start.php

- Members —
  http://www.gabaptist.info/directcommunicator/cbcc/indexlogin.php

Via Website Navigation

The other option is to go to *GA Baptist.info* website and click on your church link. The procedure for the Concord Baptist Church link is shown below.

Step 1: Go to http://www.GAbaptist.info and click your church link. Members will click the link in the *Church/Ministry Name* column. Administrators will click the link in the *For Staff Only* column.

Step 2: At the login screen, there are two possible scenarios. If your Administrators have already registered you as a Member, the following username and password conventions were used:

- Username = FirstLast, where the first initial of the first name and first initial of the last name are capitalized. The two names are put together, no spaces.

- Password = firstlast, where all are lower case with no spaces.

Members can enter that information in the boxes provided on the left side of the login screen and click the **_Login_** button. See the graphic below for an example of the Member Login screen. Then each Member may change their password after the first logon by going to the **_Profile_** button and making the update.

Members, if you have not been pre-registered you may click the "_Click here to register_" link at the top right of the login box. You will be able to create your own profile with a username and password, e-mail address, street address, home phone number, and cell phone number.

Administrators: The example graphic at the left shows the Admin login screen.

Admins may change their password after the first logon by going to the **_Profile_** button and making the update.

Section "B"—Features Chart

Direct Communicator vs. other popular e-mail and social media communication contact solutions.

Features	CAA D/C	Others
Maintain Member Individual Contact Data	✔	✔
Upload Member Photos to Contact Profiles	✔	✔
Create & Store Customized Group Distribution Lists	✔	✔
Send E-mail Messages to Group Lists	✔	✔
Send the Same E-Mail Messages via Texting to Group Lists	✔	
Generate Automated Phone Messages to Group Lists	✔	
Use Quick Filters to Dynamically Create Group Lists	✔	
Easily Add Custom Contact Data to Member Profiles	✔	
Create & Maintain Questionnaires/Surveys	✔	
Query Targeted Member Lists through Questionnaires	✔	
Tally & Report Questionnaire Results	✔	
Maintain an "Electronic Bulletin Board" Web Page	✔	
Share Info, Graphics, Pictures, Hyperlinks on Bulletin Board	✔	✔
Upload Documents & PDF Files to Shared File Storage Area	✔	
Member Viewing of Electronic Bulletin Board/Wall	✔	✔
Members Respond to Questionnaires/Surveys	✔	
Members Download Shared Documents & PDF Files	✔	
Members View & Post to Shared Comment Area	✔	✔
Members Blog to Comment Wall Posts	✔	
Popups, Uncontrolled Advertising, Private Chats		✔

Note: Contact Relationship Management server or phone system-based applications can begin to approach the capabilities offered by CAA Direct Communicator—but you will not be productively using them just two hours after starting and they will not cost as little as $29.95 a month! When you compare features, ease of use, and cost… there really is no comparison!

Section "C"—Pricing Chart

Features	D-C	D-C Plus	D-C Pro	D-C Pro Plus	D-C Comm	Comm Plus	Exec Module
Monthly Plan	$29.95	$49.95	$39.95	$59.95	$49.95	$69.95	Free
Annual Plan	$300	$500	$400	$600	$500	$700	Free
Maximum Reg. Users	500	500	1,000	1,000	2,500	2,500	N/A
Max Upload Stored Files	25	25	50	50	100	100	50
Max Single File Size	256K	256K	512K	512K	1 Mb	1 Mb	1 Mb
Max # of Surveys	10	10	20	20	30	30	20
Web Calendar		✔		✔		✔	
Facility Management		✔		✔		✔	
Event Registration		✔		✔		✔	
Online Payments		✔		✔		✔	
Organization Connections							✔

Note: A one-time setup fee of $50 will be added to all Monthly Plans. <u>With the Annual Plan, the setup fee will be waived</u>!

Key:

D-C – *Direct Communicator* Module (supports basic capacities)

D-C Pro – Professional Module (supports higher capacities)

D-C Comm – Commercial Module (supports highest capacities)

Exec – Executive Module (links hierarchically with organization of other *D-C* modules

Plus – adds Online Calendar, Facilities Management, Event Registration, & Payments

Section "D"—Master Configuration

Direct Communicator requires some brief, but foundational setup that is performed by CAA when CAA does the installation on the Internet servers. After the installation is completed, the person designated as Master Configurator can be changed to be a member of your organization, or it can continue to be a CAA technology representative.

Most of the configuration settings never change, but there are a few that may need to be changed. A brief explanation of the configuration setup follows.

Master Configuration Steps

Program Configuration

Files and Accessibility Check:
[Step 1]

MySQL Database Configuration:
[Step 2]

Confirm Site URL, Path and other parameters:
[Step 3]

Final Confirmation:
[Step 4]

Return to Main Program:
[Return]

When CAA installs your **D-C** system on the supporting Internet servers, we create the folders and implement the programs and databases for you. You get the use of **D-C**, but CAA maintains ownership of the system, software, and components. Then we follow the four steps shown in the example graphic at the left.

In **Step 1**, CAA enters the parameters that link the system and files and programs for your unique installation.

In **Step 2**, CAA enters the parameters that link the system and MySQL databases for your installation.

In **Step 3**, CAA enters the parameters that link the system to a specific domain and establishes file size limits, time zone settings, and so forth. (See the graphic on the next page.)

In **Step 4**, the setup function verifies the accuracy of the folders, paths, accessibility of databases, and program links. If there are any errors or unresolved parameters, CAA goes back to previous steps and corrects the problem. Once the setup diagnostic returns a clean report, the final system installation occurs and your *Direct Communicator* becomes ready for use.

Master Configuration Settings

MySQL Host	localhost
MySQL Database	
Admin Name	
User ID	
Password	(Write this down NOW!)
Twitter Acct	
Admin Email	
Site Title	
Website URL	http://www.directcommunicator.com
Description	
Members Security	
Member/Employee ID#	n
Organization ID#	
ID # Required	n
Admin Posting	y
Asst Admin Posting	y
Everyone	y
Staff	y
Special User	y
Max Attachment	307200
Display per page	50
Hours to Add	
Msg Board Public?	N
Login/Register?	y
Max Text Msg	140
Phone Broadcasting	y
Delete History Days	90

The example graphic at the left depicts the available configuration options. Many of these options are unique to the folder structures and domains used for your *D-C* system implementation. As such, changing them would harm your system and may render it inoperable.

However, a few of the choices are relevant to how you operate your *D-C* system and environment. These can be carefully changed. Examples include who can post on the message board, how many lines to display on a page, and whether or not the general public is permitted viewing of the message board.

CAA recommends that you not make changes to the master configuration without first conferring with us. We are happy to maintain the master configuration for you, to ensure the ongoing operability of your *D-C* system environment. Just contact CAA anytime you need assistance or want to make a change.