Equip Guide

Faithlife Equip
Integrated Suite of Ministry Tools

Using People Records

All-in-One Bundle

Faithlife Equip includes all the administration and discipleship resources your church needs.

Time-Saving Automation

Faithlife Equip saves you time with tools and workflows that cut out busywork so you can focus on ministry.

Discipleship Resources

Faithlife Equip is the only church tech solution that includes Logos Bible Software.

Faithlife EQUIP

Introduction

With People Records, Faithlife provides a robust tool for managing information about your people that also integrates with everything else you're already doing with Faithlife. Each person record is created, owned, and managed by your church and enables you to serve and encourage every individual into growth.

People records are a powerful tool for keeping track of your church members, attendees, and prospects. However, you'll also use them any time you want to store information about anyone, like emergency contacts, missionaries you support, contractors, etc. Instead of storing data in multiple places, your people database provides a single place where all of your people-related data is accessible.

People records belong to your church. Individuals do not see what information you store on their records, and they do not need a Faithlife account for you to add them to your database.

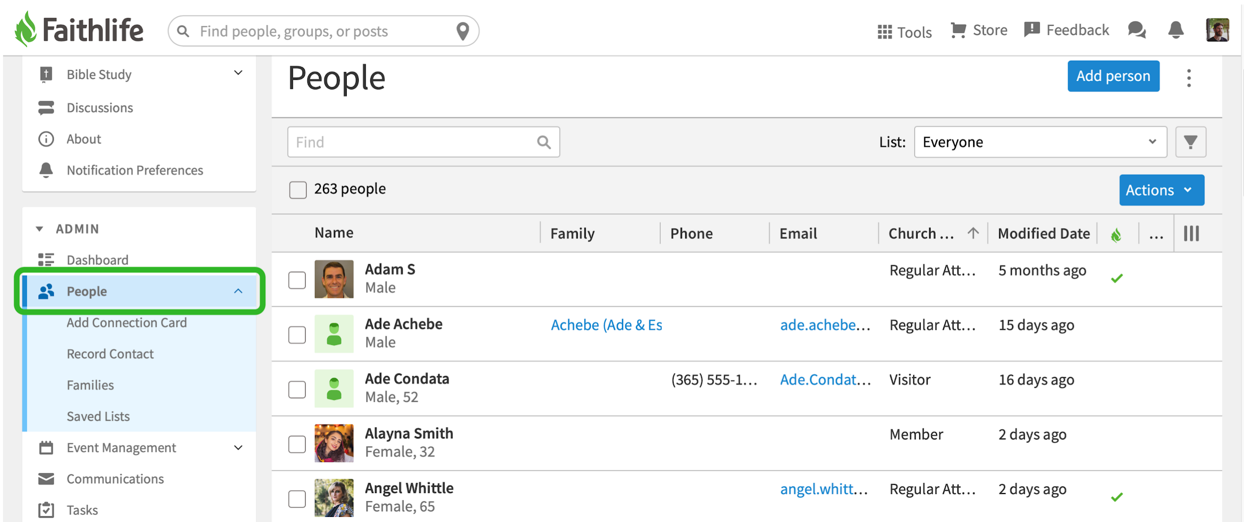
We'd love to hear from you. Let us know what you think of this resource at https://faithlife.com/store/surveys/trainingfeedback.

What Are People Records?

People records are *administrative* records about the people connected to your church, which make it easy to send targeted communications, track interactions with your people, visualize family relationships, and more.

Example: If you meet someone Sunday, you can add them as a new connection (see below) and a new person record will be created. If you follow-up with an email or a text, Faithlife adds it as an interaction on their record. As they continue in their faith journey, your staff can intentionally connect with them and keep track of these touchpoints. During this time, your visitor will *not* receive an email inviting them to your Faithlife group or even know that you're adding notes about your care for them. Adding their person record simply helps your church staff track their ministry to people.

To view existing people records, go to your Faithlife group and click **People** in the **Admin** panel.



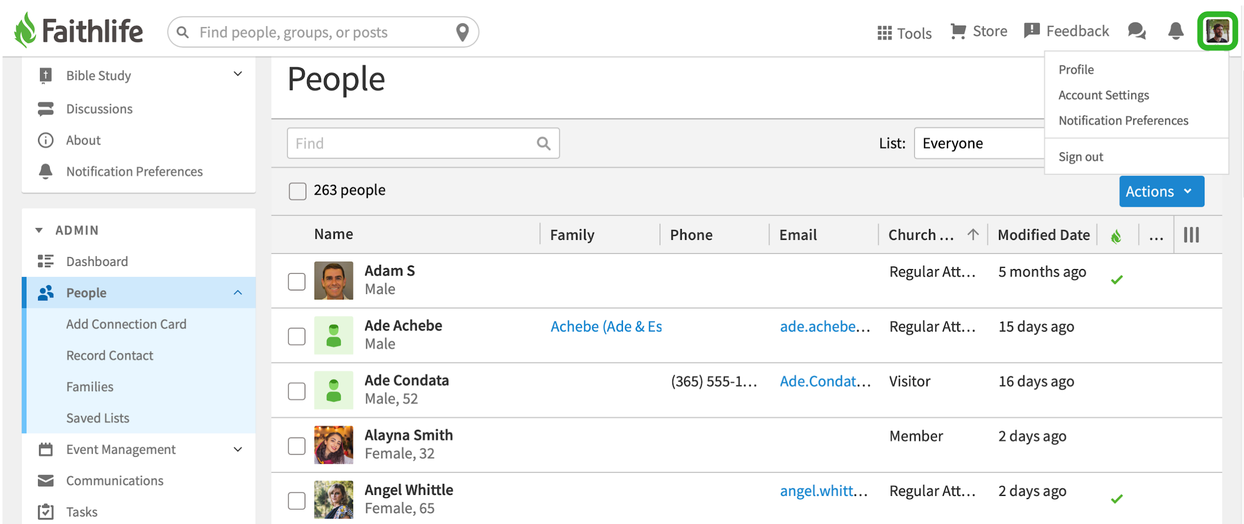
Person Record or Faithlife Profile—What's the Difference?

By this point, you've probably noticed references to People Records and Faithlife Profiles, and you may be wondering what the difference is.

People records are your church's administrative records about people connected to your church. Your church creates, owns, and manages those records and they exist whether or not the person has a Faithlife profile or has joined your church group on faithlife.com.

If you create a person record, it requires a second step to invite that person to join your church group on faithlife.com.

A **Faithlife Profile** is created, owned, and managed by an individual. You can find your own profile in the top right-hand corner of your browser. When you click your Faithlife Profile avatar, you can customize your profile from the **Account Settings** drop-down option.



If you invite someone to join your church group on faithlife.com, we automatically create a person record for you in the Admin panel since your church wants to minister to them. In their account settings, they can choose to share their profile information with your church group to make it easier for you to fill out their person record. In fact, each time a person updates their account settings, you can choose to review the changes and update their person record in the Admin panel.

If someone does have a Faithlife account, you will be encouraged to link it to their person record.

If someone joins your group and has chosen to share information with the admins of groups they join (in their personal Faithlife account preferences), you will be offered the opportunity to update their record with the information they provide. This is optional, ensuring you have access to their updated information at your choice but that they can't delete information you had already stored.

People Page or Directory—What's the Difference?

No doubt, you've also noticed references to both the Directory and the People tab on the Admin panel. The **Directory** is available to anyone in your group (depending on your group privacy settings) while **people records** are available *only* to admins of your church group.

The Directory displays the names, contact information, and other relevant details for people records of a church group with the church status of *Member* or *Regular Attendee*.

Although the Directory contains information about individual people, the church group owns and manages the displayed information. Only Admins or Moderators of your group can change Directory information. Members can view all details made visible by admins.

As an admin, you can toggle between **Admin** and **Member** view in the top right-hand corner to ensure *only* information you want your members to see displays from their viewpoint. Additionally, as an admin, you can navigate to the full person record from the directory by clicking a person's name in the directory.

Note: You can adjust these default settings to change who has access to view your directory or how children are displayed.

You can remove anyone from the directory's actions menu. Check their row in the directory, click **Actions**, and select **Remove from directory**.

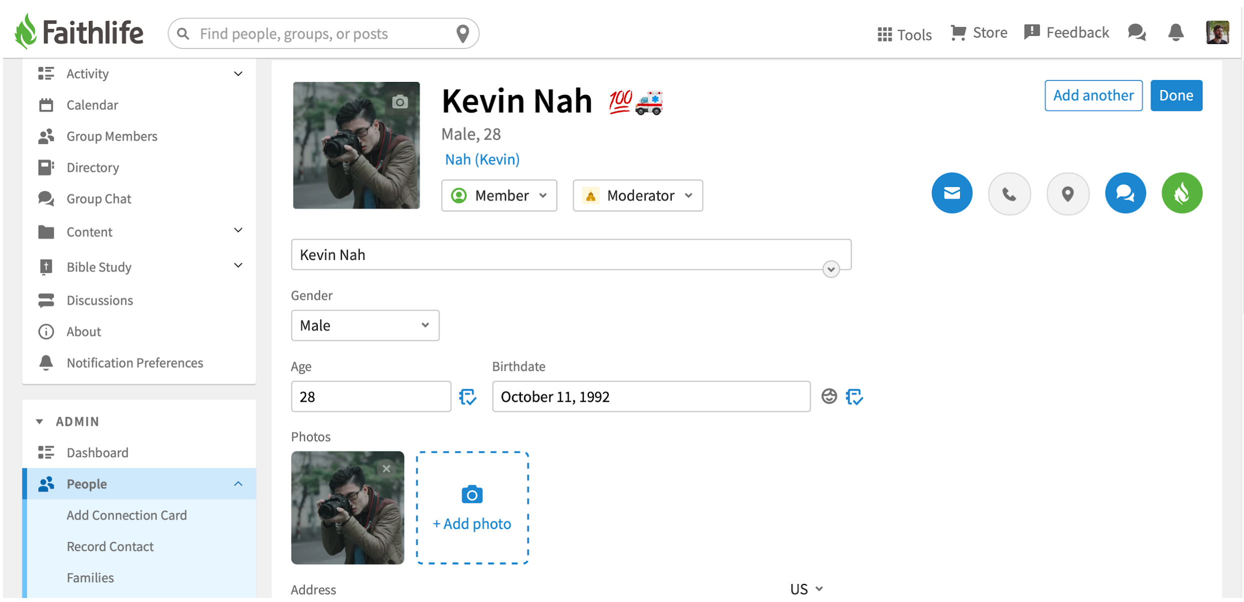
Person Record or Organization Record—What's the Difference?

Along with people records, your group also has a database where you can add, manage, and retrieve records about organizations you interact with such as vendors, parachurch ministries, etc. Use people records to store information about individuals. Use organization records to store information about organizations (this is where you can track contracts, accounts, interactions, etc. that you have with them). If you have a primary contact person in that organization, you can link their person record to that organization's record.

What's in a Person Record?

People records are made up of several sections, each of which contains different sets of information. You can use the Reporting feature to quickly view all of your people records that contain data in the fields described below.

Basic Information



- **Avatar** — Click the **Camera** icon by a person's avatar to add a photo.
- **Family** — Shows the rest of the person's family as recorded in the Family record.
- **Status** — Refers to the person's formal connection to your group (e.g. member, visitor, former member, etc.). The status of each person is only visible to admins and can signify anything you want.
- **Role** — Allows you to view or change the person's role within the group. This changes to **Invite** if the person is not yet part of your group. Within this dropdown, you'll also find the option to link a person record with an existing Faithlife account. This pulls public data from a user's Faithlife account to populate fields in their person record.
- **Connection Links** — Features quick links to contact the individual through email, telephone, physical mail, or through their Faithlife profile.

- **Name** — You can provide additional information, such as a title or middle initial, by clicking the small **Arrow** icon below the name field.
- **Gender** — Faithlife guesses a person's gender based on statistical information about their name. When information is based on a computer guess, it's shown in blue, not black, with a **Light bulb** icon next to it. You can hover over the icon for the source of the guess and click it to confirm the accuracy. Or just change the value.
- **Age/Birthdate** — Enter an age, age range, or birth date. Faithlife will automatically populate the corresponding field.
    - To designate a person as a child/adult, click the **Child** icon. A blue icon indicates the person is listed as a child.
    - You can select whether certain fields are included in your group directory (visible to all group members). To toggle this, click the **Directory** icon. A blue icon with a checkmark indicates the information will be included in the directory. Any field without a **Directory** icon will **not** be listed in the group directory.
- **Photos** — You can associate additional photos with a person record. Click the **Star** icon on a photo to make it the avatar for this person.
- **Contact Information** — The record has space for multiple addresses, phone numbers, and email addresses. If you want to provide more specific information, such as the phone type or additional address details, click the arrow to display additional fields.
- **Social Profiles** — Faithlife will suggest public-facing social profiles that may belong to a person. Click the profile to associate it with the person record. Faithlife will also use public information on those social profiles to populate fields in the person record.
- **Emergency Contact** — Provide an emergency contact for a person.

    Note: To add a person as the emergency contact, they must have a person record. If one doesn't exist, you must create one. (Using people records for every person helps ensure consistent and up-to-date information. Though you may have youth group attendees whose parents do not attend the church, you should create records for the parents that contain their contact information. This prevents accidental mistakes like updating the parent's phone number on one sibling's Emergency Contact but not on the other's, etc.)

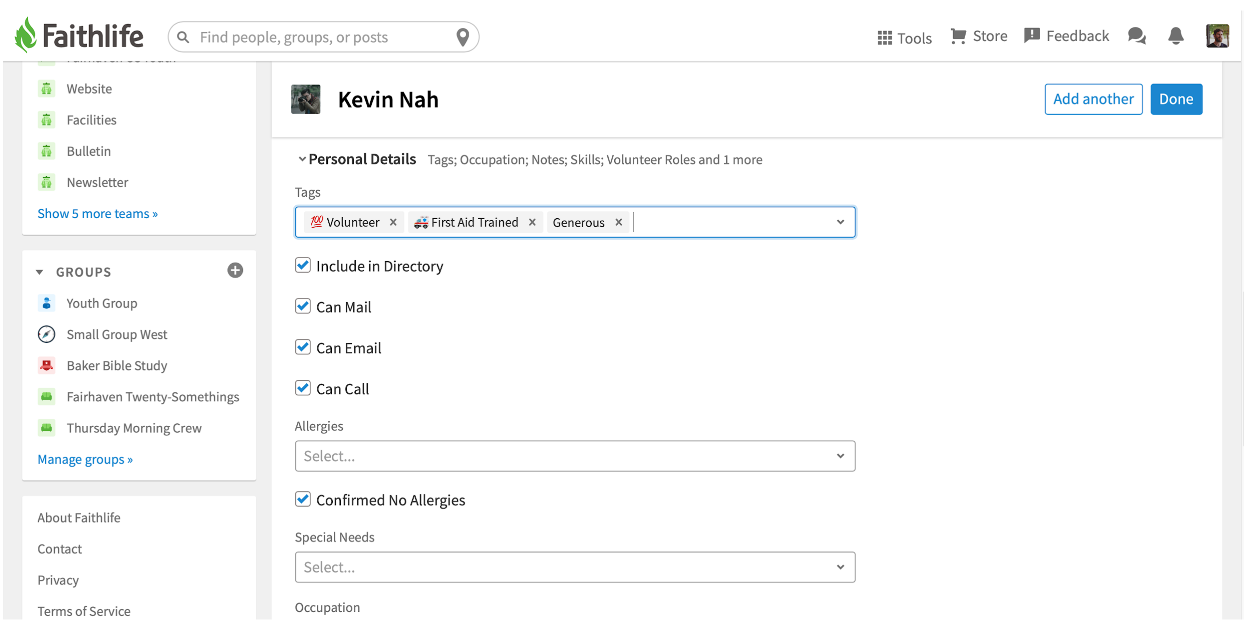
- **Files** — Allows you to drag and drop files to the record.

When a person with a linked Faithlife account changes their own account settings, Admins will see a message on their Person record saying, "New faithlife.com account information available." Next to the message, you'll find a button allowing you to **Review changes**. Clicking this button takes you to a screen showing the new information and letting you choose what to add to their record.

Teams & Groups

This section displays all of the teams (like the Finance or Media teams) and groups (such as small groups or other subgroups) the person is part of in your church group. Both the Teams and Groups sections allow you to add the individual directly to another team or group from their person record.

Personal Details



- **Tags** — Add custom tags to a person record. See more on tags below.
- **Include in Directory** — Select whether the individual should be listed in your group's directory (visible to all group members).
- **Can Mail/Email/Call** — Denotes a person's contact preferences. This is something that you can look up individually and will impact the way you're able to communicate with

that person. For example, unchecking **Can Email** will remove that person from your list of email newsletter recipients.

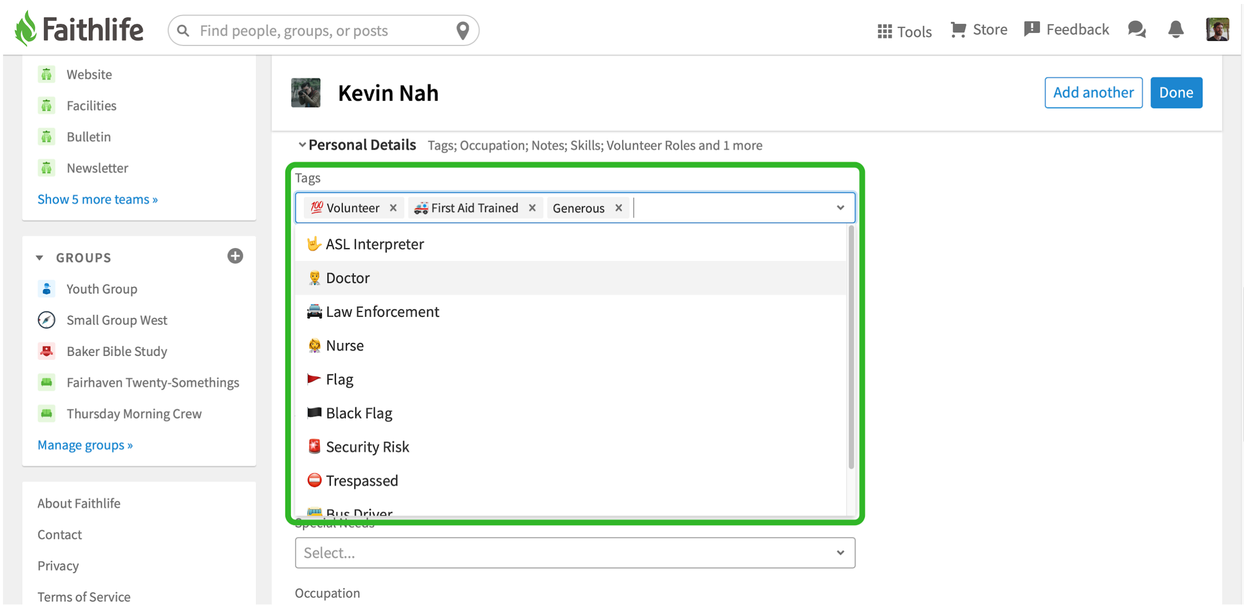
- **Allergies** — Provide any known allergies, or select **Confirmed No Allergies**.
- **Special Needs** — Select from the dropdown, or type and press enter to create a new special needs type.
- **Occupation** — Enter an occupation.
- **Notes** — Type a note in the box, check **Private** (if desired), and click outside the text box to create the note. You can edit an existing note by clicking it. Two different types of notes are available.
    - **Admin notes** (default) are visible to any group admin with access to people records.
    - Tick the **Private notes** box to restrict the note's content to the account that created it.
- **Bio** — Provide a biographical note for that person.
- **Skills, Volunteer Roles, Personality Profile** — Select from the drop-down menu, or type a new entry and press **Enter**. You can query these fields when you create a new list.
- **Barcode** — Enter an alphanumeric barcode associated with the person record.
- **Envelope** — Enter a numeric envelope number associated with the person record.

Using Tags

It can be difficult to scan through multiple person records to find people that meet a specific set of criteria. Faithlife makes this process easier by allowing you to tag person records with text and emojis. This allows you to scan, for example, for people who are certified in First Aid, have completed background checks, etc. Emojis will be visible to group admins in the people record and in the directory. Text tags are visible in people records.

To add a tag:

1. Put your cursor in the "Tags" field and open the drop-down menu.
2. Select one or more of the available text tags or emojis.



To define a new emoji tag:

1. Activate your emoji keyboard.
    - Windows: press **Windows + .**
    - macOS: press **Ctrl + Cmd + Spacebar**
2. Click within the Tags box.
3. Select an emoji
4. Enter a space, then a title or description for the emoji you've selected, then press **Enter**.

To enter a new text tag:

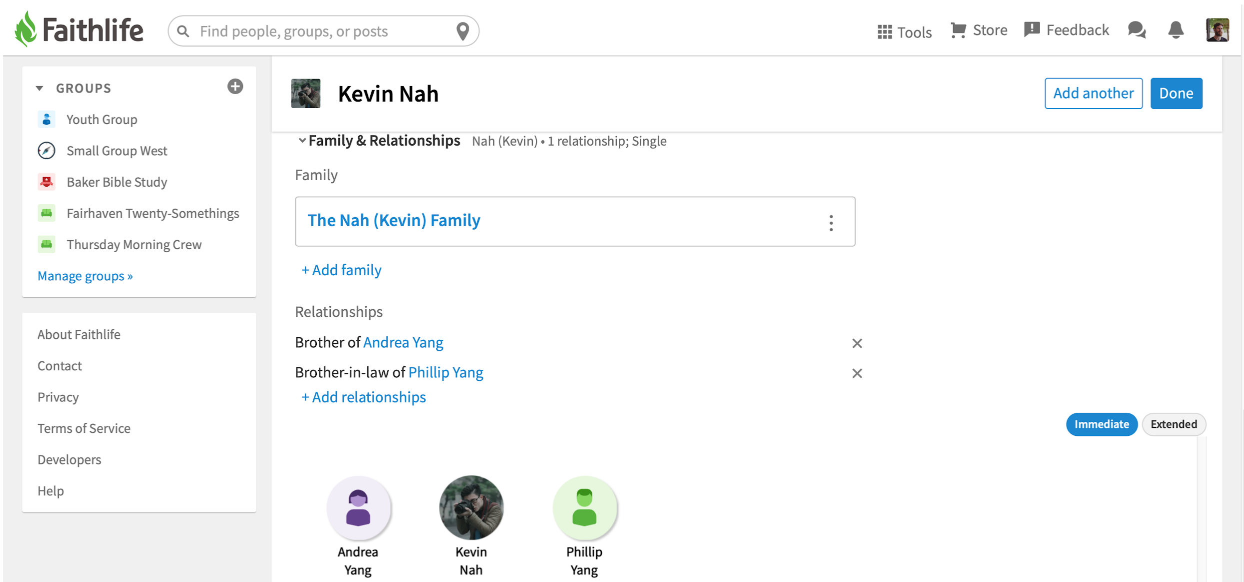
1. Click within the Tags box.
2. Enter text.
3. Press **Enter**.

Faith

The Faith section provides a range of fields related to an individual's membership status, spiritual development, and background.

- **Campus** — If you have a multisite church, you can use this field to record which church campus a person attends.

Family & Relationships



- **Family** — You can associate multiple people records with a family record. Click **+Add family** and select an existing family record or **Create a new family record**. Learn more about family records in Step 1 below.
- **Relationships** — You can store information about a person's relationships. Click **+Add Relationships**, then select a relationship type and the relevant person record. If a person record doesn't exist for that person, select **Create a new record**. This also features a family tree showing that person's relationships.
- **Marital Status & Wedding Date** — Add the relevant entry. You can select whether one or both of these appear in the group directory by clicking the **Directory** icon beside each field.

Employment & Organizations

This section provides fields for recording an individual's employment history and organizational relationships.

Education

The Education section provides fields for recording an individual's educational background.

Background Check

The Background Check section allows you to record a passed background check, date of last check, and the background check renewal date.

Interactions

The Interactions section allows you to record interactions between church staff, volunteers, etc. and a person. Click **+ Interaction** and fill out the relevant fields, then click **Done.** Interactions are visible to any group admin with access to your group's people records.

Activity

The Activity section lists the changes that have been made to the person record.

Timeline

The Timeline section displays all of the significant dates that are recorded in the person record. You can zoom in and out, or click and drag the timeline to view earlier or later date ranges.

PART 1

Create People Records

When it comes to creating people records, you can either add them individually or add them in a batch from a .csv file. You can also add people by creating family records.

Add a Person

As a group admin, you can create people records for your group and link them to an existing Faithlife account. As is mentioned above, this pulls some information from the profile and adds it to the person record. You have several options for how to create people records. Select the method that works best for you.

- If you only have a few people to add, but you have a lot of details to include, consider adding them from the People menu.
- If you have limited information about people you want to add (perhaps you just met them and only got their names), consider using a digital connection card.
- To add all of the members of a family at the same time and ensure their records are linked, consider creating a family record.
- Moving your whole database over from your previous software? Consider a bulk import using a .csv file.
- But what if you're just getting started and don't have a database to draw from? Simply invite people to join your group, and Faithlife will automatically create people records!

Note: When someone gives to your church with Faithlife Giving, a person record is created automatically. If their email address is already associated with a person record, the gift will be automatically connected to the existing record.

Add a person from the People menu

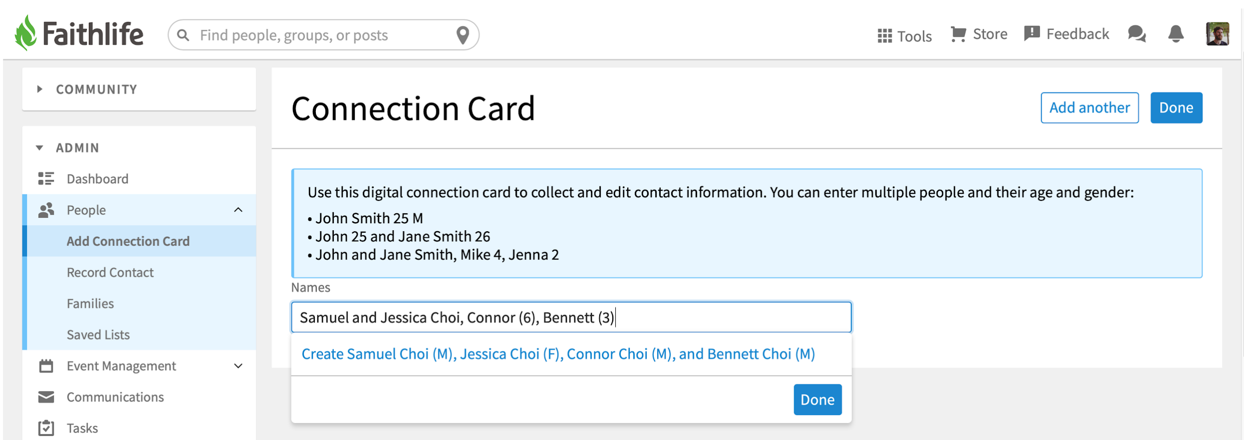
1. In your group's Admin panel, click **People.**
2. Click **Add Person**.

3. Provide a name, and select whether the individual is a child or an adult. If desired, you can add a photo of the individual (this photo may be visible to any member of your group).
4. Click **Create**.
5. The person record will open. You can provide additional information about the individual or click **Done**. To add another person record, click **Add Another.**

Create a digital connection card

Digital connection cards provide a way to quickly create one or more records, even with limited information.

1. In your group's Admin panel, click **People**, then click **Add Connection Card**.
2. In the text box, type a name and any additional information you want to be associated with that record (such as age or gender). The system will parse the information you provide and assign it to the relevant fields.



Note: To create more than one person record at a time, insert a comma or "**and**" between the information for each person.

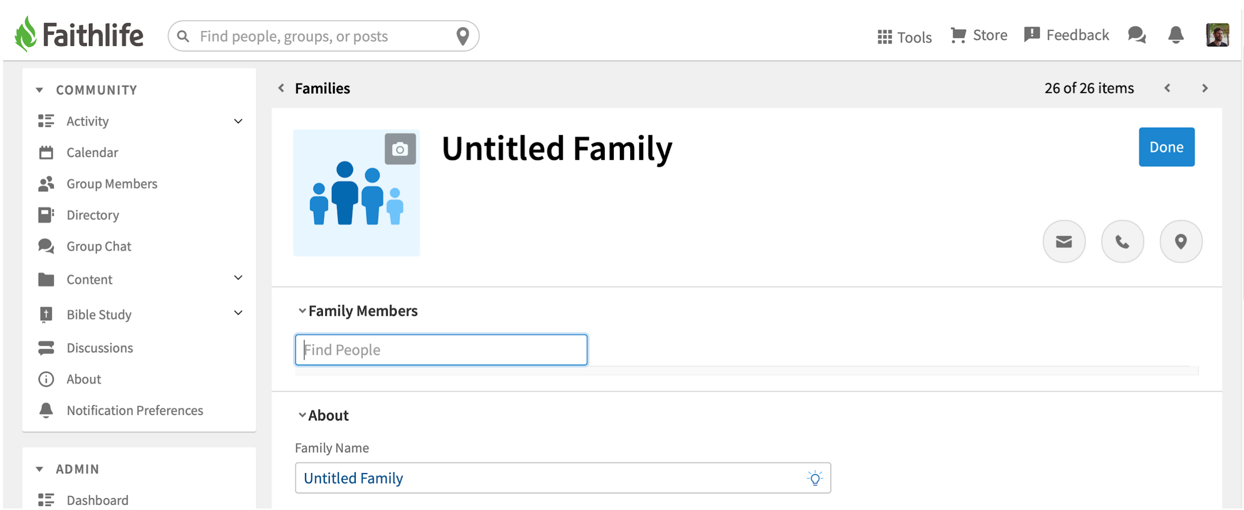
3. Press **Enter**. Based on your input, one or more person records will be created. If you add more than one person, the system will ask if you'd like to add all new records to a family record.

Create a family record

Family records link individual person accounts in a family unit, which has certain types of data associated with it (such as an address, phone number, etc.). Adding people via a family record is the best approach when it's more important to get the whole family in the system than it is to include detailed information on a single person record.

You can create a new family record from existing or new people records or using a combination of existing and new records.

1. In your group's Admin panel, click **People**, then click **Families**.
2. Click **Add family**
3. Add individuals to the family by clicking **+ Add Family Members** and typing a name in the search box that appears.



4. If a person record for that individual exists, click it to add it to the family record. Otherwise, click **Create a new record**. Repeat this step for each family member.
5. After you've added individuals to the family record, provide a family name, address, etc. in the boxes below.

Learn more about family records below.

Bulk import records

In addition to adding records individually or by family, you can also import records in a batch from a .csv file. Simply follow these steps:

Export a .csv file from your old system

Your exact exporting steps will vary depending on the steps required by your previous system. If given the option, export your .csv with:

- individual records (instead of family records)
- a header row
- one item per column (for example, first and last names should be in different columns).
- all of the data you want to move into Faithlife. Faithlife will create a custom field for any data types that it doesn't have a predefined field for.

Make sure to select .csv as your file type for export.

Check your .csv file

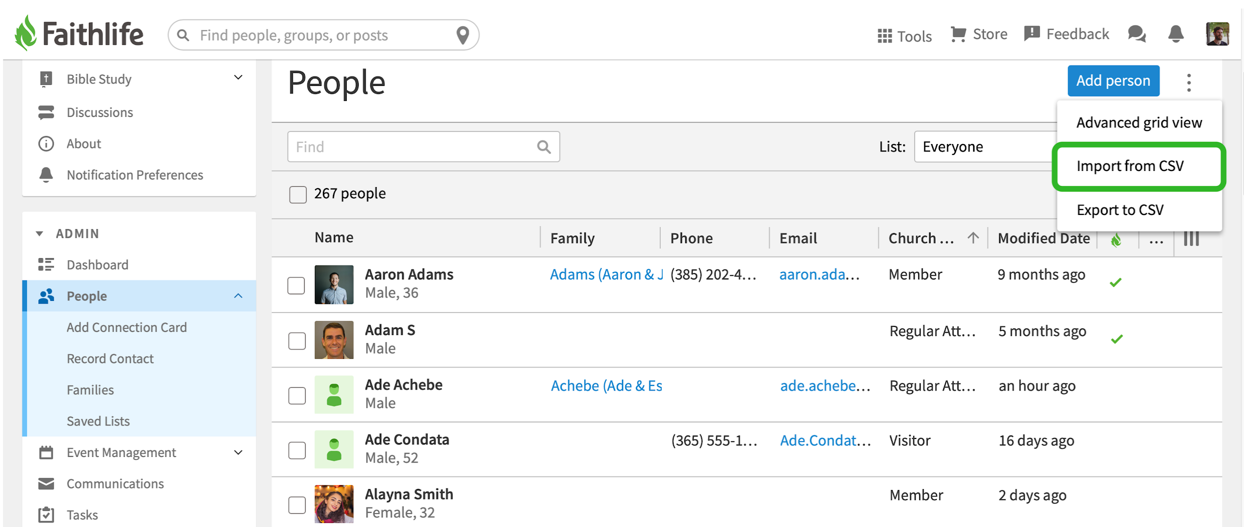
The Faithlife platform is designed to interpret and import your .csv file. While the import process should require minimal work, there are a few things you can do to help avoid data issues. Generally speaking, it's better to clean up your data *before* you import.

1. Open your .csv in a spreadsheet application like Microsoft Excel, Google Sheets, or Apple Numbers.
2. Make sure that the column names match the data in the columns (e.g., that phone numbers appear in the "Phone Number" column).
3. Check that you have one item of data per column. For example, "Age 28, July 9, 1989" contains both an age and birthdate. Instead, you want those two pieces of information represented in two columns, one for age and one for birthdate.
4. Disambiguate names. If your .csv file does not have a "family" column, and if you have more than one family with the same last name, add a number in the last name column

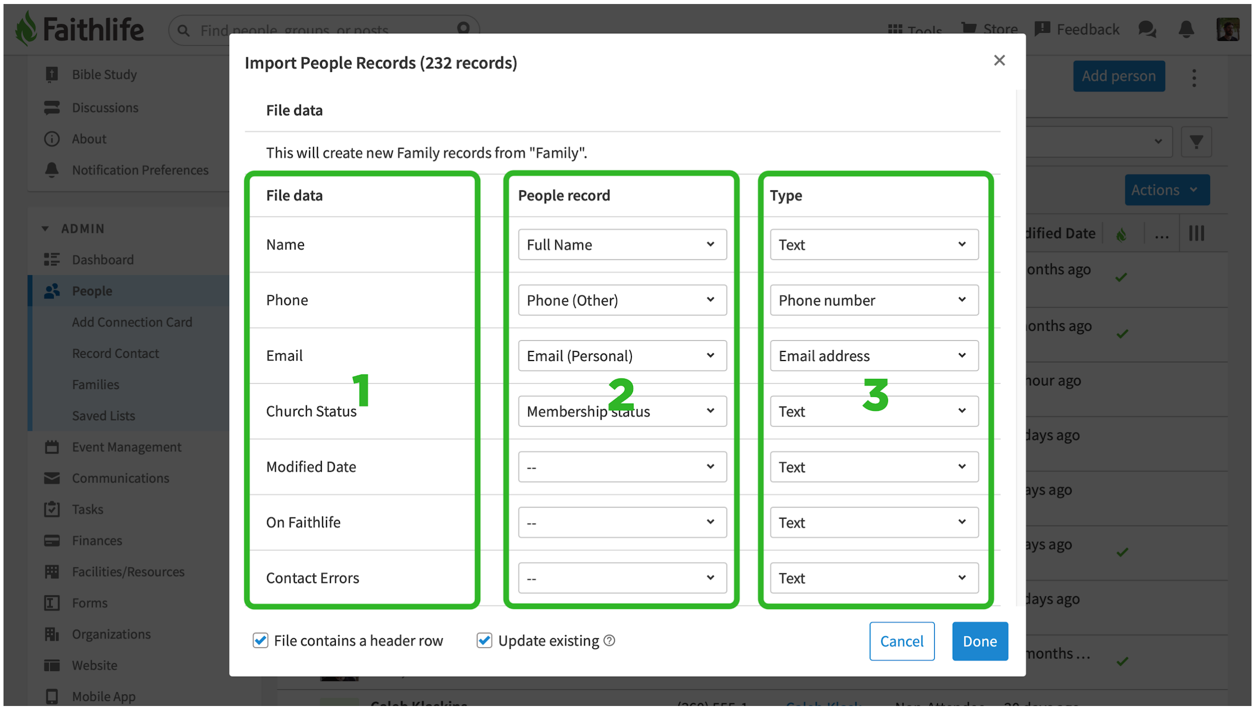
(e.g. “Smith 1”). Otherwise, the Faithlife platform will treat everyone with the same last name as members of a single family.

Import your .csv file to Faithlife

1. Navigate to your church group on faithlife.com.
2. Go to your people tab.
3. Click the **More options** icon , then select **Import from .csv.**



4. Select the .csv file you exported. A window will appear with three columns.
   - The first column displays column names from the first row of your .csv file.
   - The second column displays the corresponding field on the Faithlife platform.
   - The third column displays the type of data corresponding to each column.



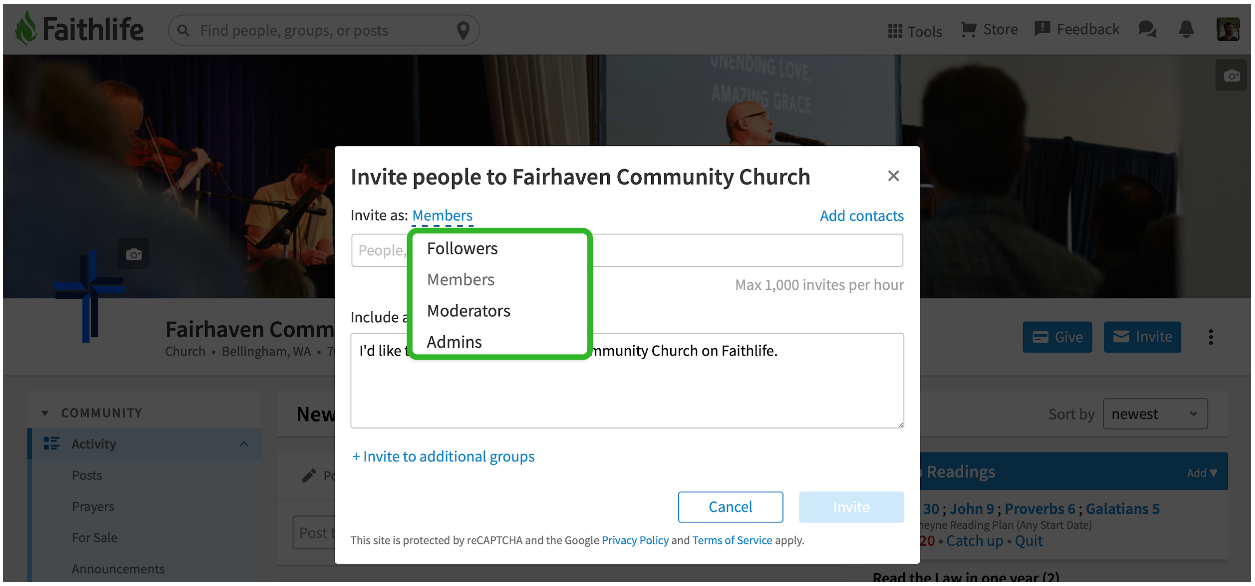
5. Ensure that the first and second columns match as closely as possible. For anything you can't match, select **Notes** in the second column. Do not leave empty rows in the second column. If you do, that data will not be imported.
6. Check the data types in the third column and make sure they correspond to the first and second columns. For example, that email addresses are correctly designated with the email address data type.
7. Check or uncheck **File contains a header row.**
8. Check or uncheck **Update existing**. If you leave this checked, the system will search for corresponding people records and override them instead of creating new ones (the system will ask you to confirm the changes).
9. Click **Done**. It may take a few moments for the system to process all of the data—do not press **Done** more than once. When it's ready, your people records will appear in the People area of your church group.

Invite someone to your group

Faithlife automatically generates a person record for each member or follower of your group.

1. Navigate to your church group on faithlife.com.

2. While viewing your church group, click the blue **Invite** button in the top right.
3. Choose your invitation level. By default you will invite people as **Members**. To invite people as Followers, Moderators, or Admins, click **Members** and choose a different **Invite as** option (depending on your role in the group, not all of these options will be available to you).



A person's role in your group determines the level of control they have over group content and permissions:

- **Followers** can interact with public content or content marked for followers.
- **Members** can actively participate in the life of the group by posting on the group page, sending messages to others, and interacting with the group's content.
- **Moderators** help manage group content and have higher access to group settings and permissions.
- **Admins** have complete control over group content, settings, and permissions.

Note: Admins of your church group can customize your group content permissions for each of these roles.

4. Add invitees.

Enter email addresses and then confirm your choice below in the dropdown. You can bulk add people to your invitation by clicking **Add contacts** and uploading a .csv file with email addresses in a single column. The email addresses in the .csv files will auto-populate the To field. Faithlife only imports email addresses from the .csv file. Any other data in the .csv file will be ignored.

Note: You can invite people to join other groups, subgroups, or teams you have inviting privileges in using the **+invite to addition groups** option. This speeds up the invitation process if someone should belong to several groups you manage.

5. Finalize and Invite.

   Consider adding a personal note to give some context to the invitation, and click **Invite**.

   If invitees already have a Faithlife account associated with the email address, they can sign in and join your group. If they don't yet have a Faithlife account, they'll be prompted to quickly provide their name and a password to join your group and create an account at the same time.

   To view someone's status in your group, select **Group Members** in the left-hand sidebar. Admins can also view pending invites and send invites to anyone with an email address who is not part of your group from the Directory.

   Note: To withdraw an invitation or change an existing person's status, select the person's row in your Directory, expand the **blue Actions button**, and choose **Withdraw Invitation** or **Change to…[Follower, Member, Moderator, or Admin]** respectively.

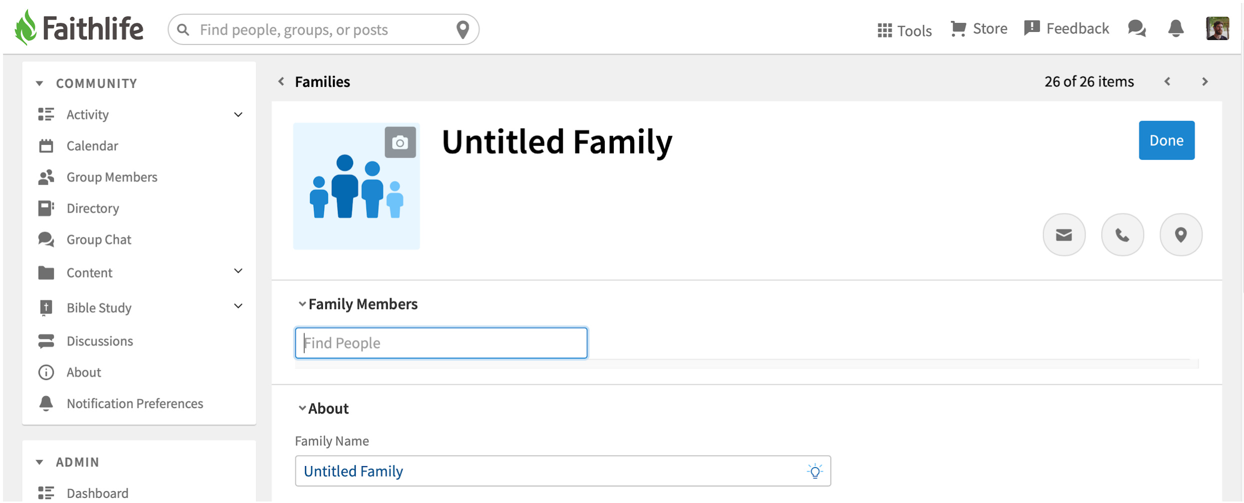
Add a Family Record

Family records allow you to create, manage, and search information about family units in your church. Adding people records to families ensures you understand the connections between your church members, aids in communication with parents of minors, helps minimize data entry for shared family information (e.g., mailing address), and more. They are designed to be flexible and adaptive to a variety of family configurations.

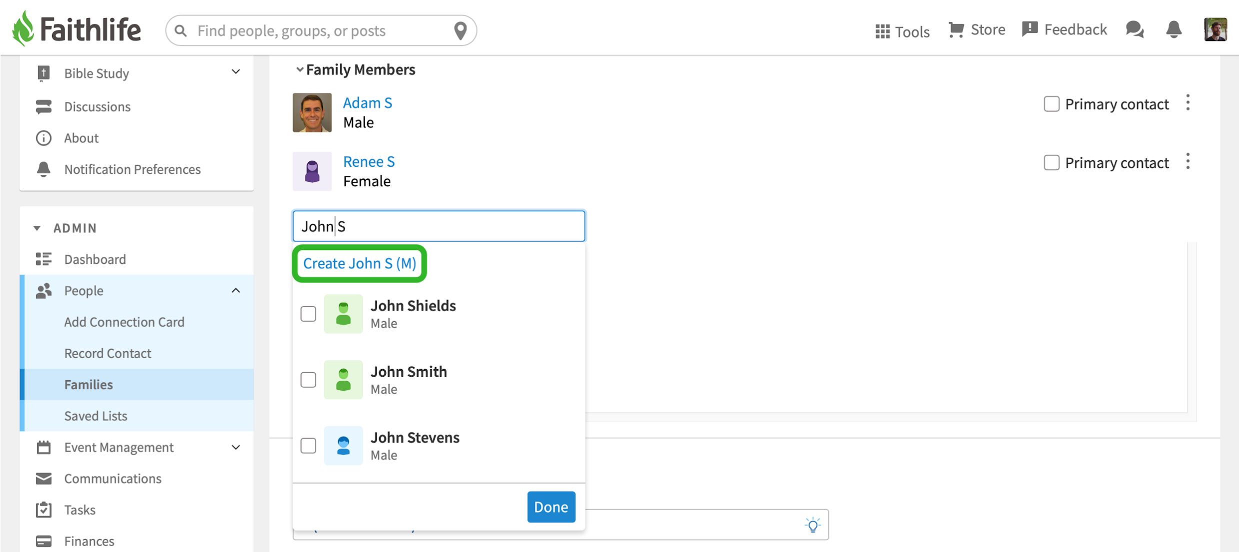
To create a family record:

1. Navigate to your church group on faithlife.com

2. Click **People** in your group's Admin panel.
3. Click **Families**.
4. Existing family records will appear in the main panel of the page. You can search and filter these records. To create a new family record, click the **Add family** button.



5. If desired, add a photo representing the family unit. This photo will appear in the Directory and will be visible to all members of your church group.
6. Add people to the family record by clicking **+ Add Family Members**.
7. Begin by typing a person's name. You can select existing people records to add to the family record, or create new records by typing the person's name, then selecting **Create new record**.



Note: New person records created this way are empty. You can modify them by clicking on the person's name or from the People page.

8. By default, the first person you add to a group is treated as the primary contact for the family and defaults as the family name. You can change or designate additional family member(s) as the primary contact, and their name(s) will appear in the Family Name field. (Faithlife uses the primary contact to infer the family name and address.)
9. The **Address as** field determines how certain communication is addressed to the family unit. It is automatically populated based on the family name. You can modify it by clicking in **Address as** text box and entering different text.
10. Provide addresses, phone numbers, and email addresses for the family. You can select which information to include in your group's directory by clicking the **Directory** icon next to each field. A blue checked icon indicates that the information will be included in the directory.
11. Add any additional photos you'd like to be associated with that family record. These photos will be visible to any member of your church group.
12. Click **Done** to save your family record.

PART 2

Manage People Records

Now you have people records connected to your church group. But how do you add new information to those records, edit what's already there, or delete them entirely?

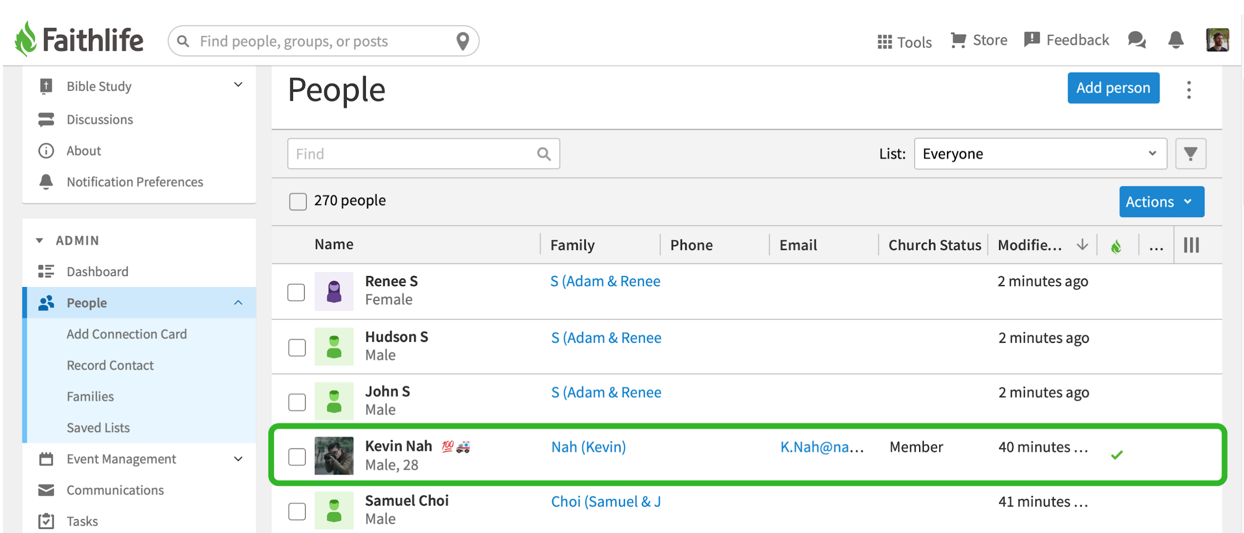
Edit People Records

Edit individual records

Anyone who is part of your group can choose to share their personal Faithlife profile information with your church group. You can update your administrative person record information when the person updates their personal Faithlife profile. While you can manually update people records, if a person record also has a Faithlife profile, you can quickly confirm updated information they provide.

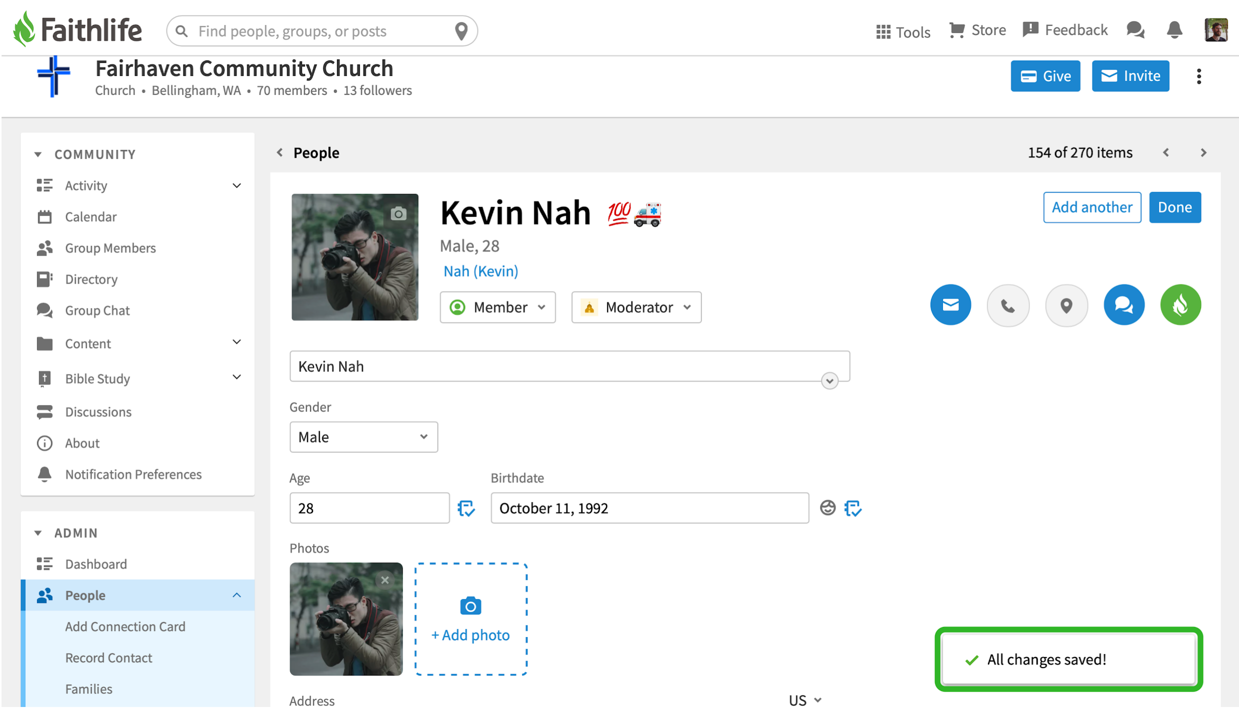
Note: Remember, people records are created, owned, and managed by your church group. Faithlife profiles are created, owned, and managed by individual faithlife.com users. While they can interact with each other, people records and Faithlife profiles are not the same.

1. From the People page, click a person's name to open their record.



2. Make edits.

   You can manually edit or add any new information, and Faithlife will save your changes to the person record automatically. A small banner displays to confirm All changes saved.

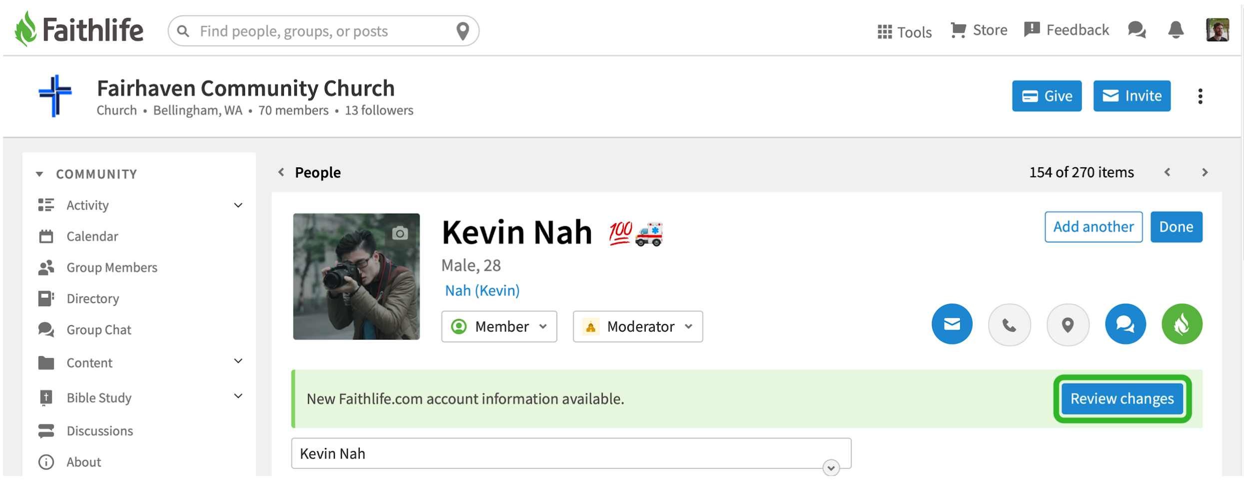


3. Review changes.

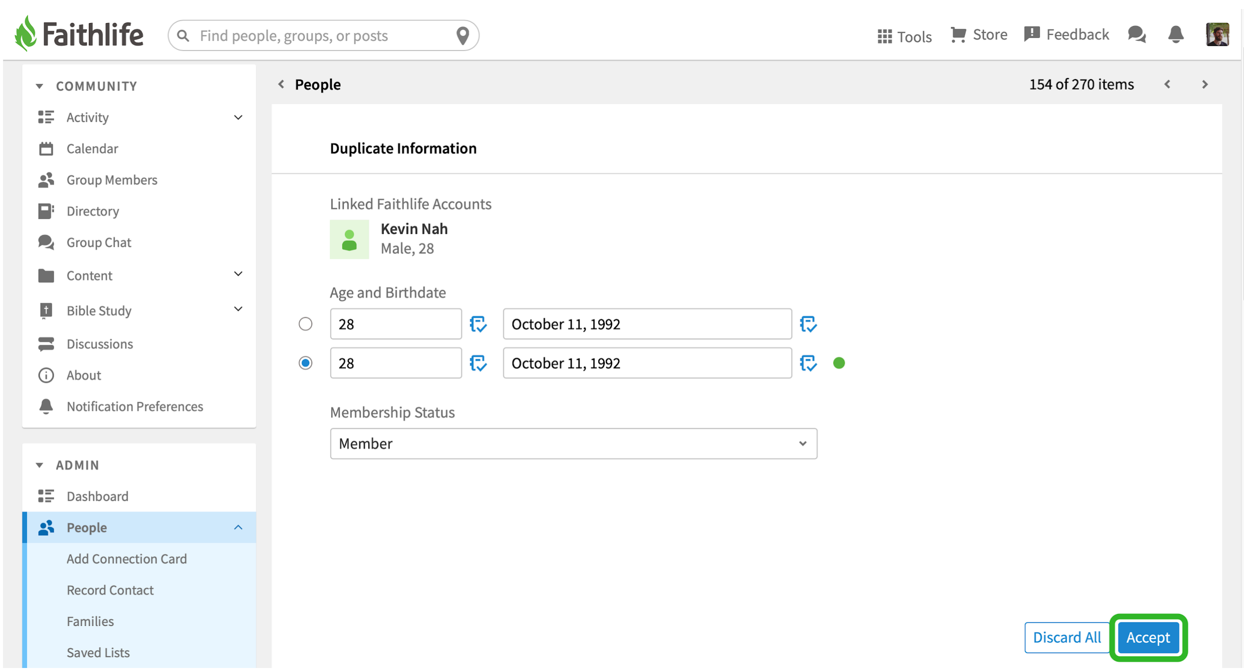
   Anyone with a faithlife.com profile can update their profile information from their profile's **Account Settings**. In these same settings, they can [choose to share the information with your church group]() so you can update your people records.

   Encourage your people to update their account settings and share it with your church so you can quickly get the most up-to-date information on each person.

   If the person has recently updated their faithlife.com Profile, you will see a green banner. Click **Review changes**.



Any recent changes will display. Select or deselect the **Directory icon** to show the information in your church directory or click the **Trash** icon to reject the information. Click **Discard All** to reject the remaining changes or **Accept** to update your person record.



All changes will save automatically.

Bulk edit people records

Faithlife gives you the ability to edit multiple records with a single set of actions, saving you time and energy. For example, your church just welcomed eight people into membership. The status of all these individuals can be updated with a few simple steps.

1. Select records.

   Scroll through your list and check the box to the left of the person record to select it.

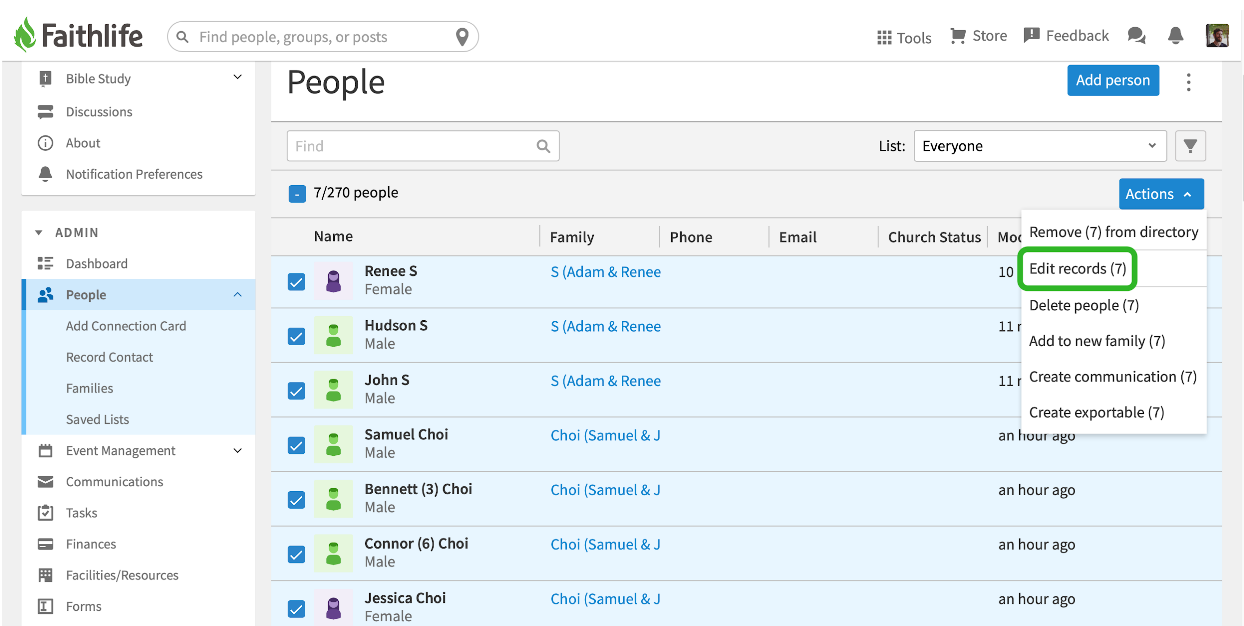
   OR

   Enter the name (or part of the name) in the **Find** box. Check the box to select the record. Repeat this process to select additional records. Faithlife keeps your previous searched names selected as you continue adding names to your list.

2. Open Edit records menu.

   Click **Actions** to expand the drop-down menu and select **Edit records**.

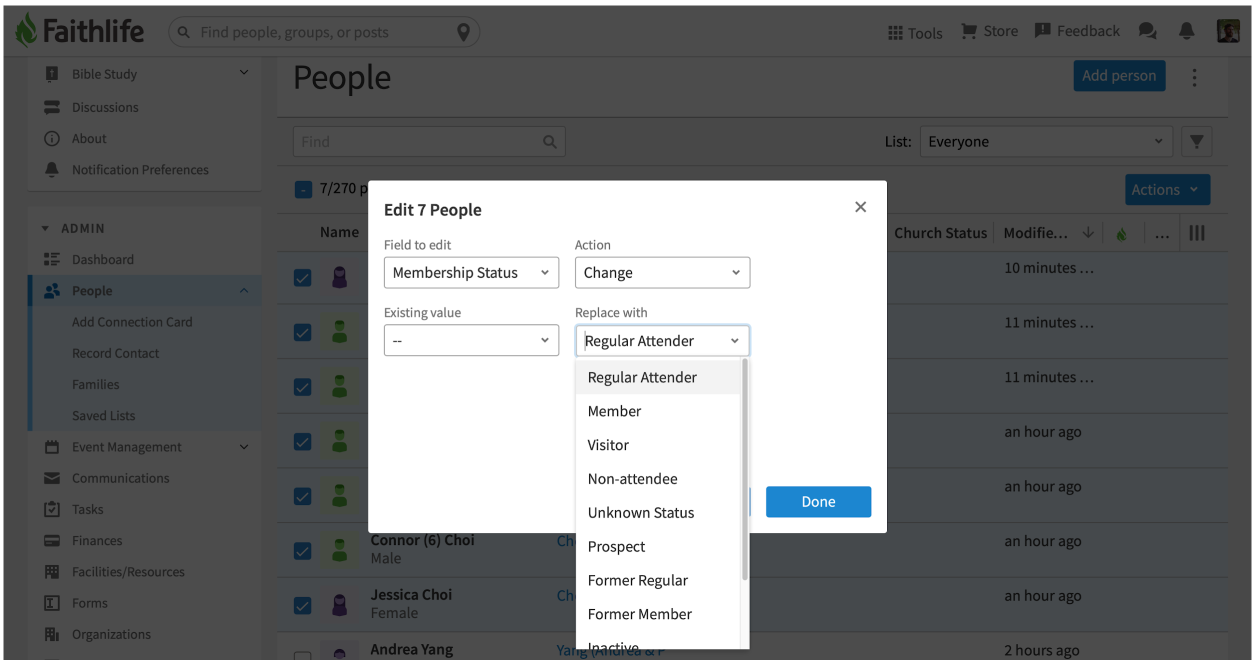
   Note: The number in parentheses indicates the number of records selected.



3. Edit field.

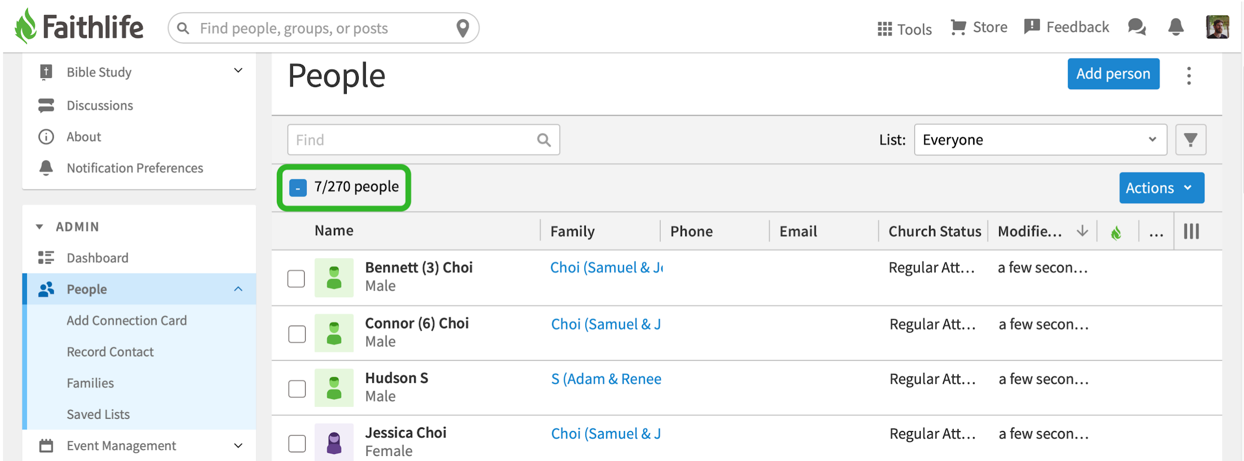
Use the drop-down lists to select:

- **Field to edit** – Select from available fields
- **Actions** – Select **Add to**, **Change to**, **Remove**
- **Existing value** – All existing values in the selected records display in this list. Select **All values** or you may choose to modify only one of the values.
- **Replace with** – The drop-down list displays available labels for the selected field.



4. Click **Done**.

Faithlife updates all your selected records with your chosen values. To edit additional fields, repeat this process. If you are finished working with your selected records, make sure to deselect them by clicking the main checkbox twice.

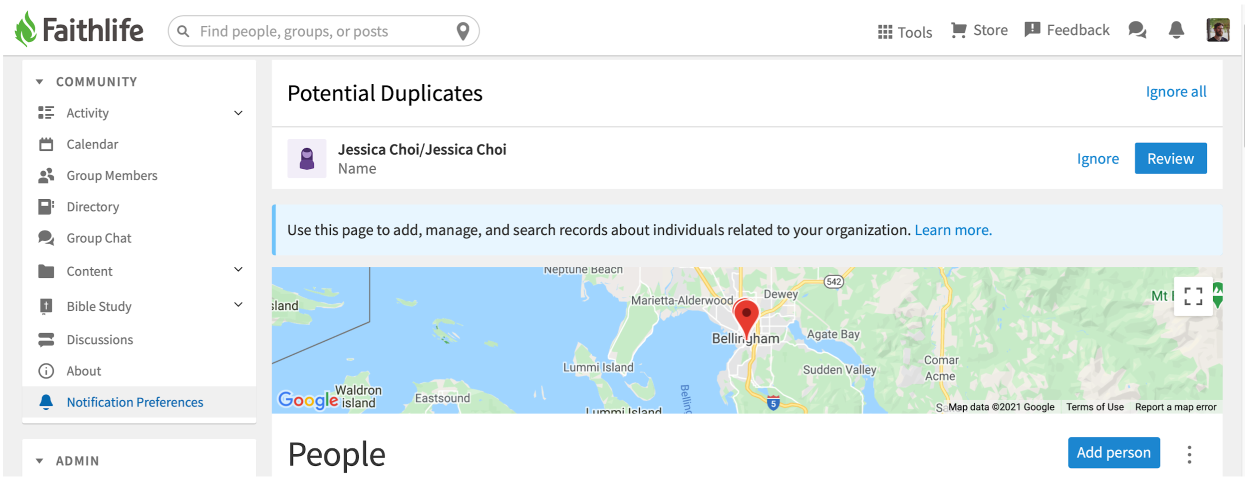


Duplicate Records

Duplicate person records occur if you import a list of records containing data for people already belonging to your Faithlife church group or if a group administrator accidentally creates a record for someone who already has a record in the system. Faithlife allows you to merge information from these records so that you can keep the correct, relevant information from each record and remove the duplication.

Merge records from notification

In most cases, Faithlife notifies you of the potential duplicate record(s) when you open the People section under the Admin panel.



1. Review records

   Click **Review** next to the record to open the **Duplicate Information** panel.

   Note: If you click **Ignore** or **Ignore all,** Faithlife no longer notifies you or any other Administrators in your group about the potential duplicates.

2. Resolve duplication

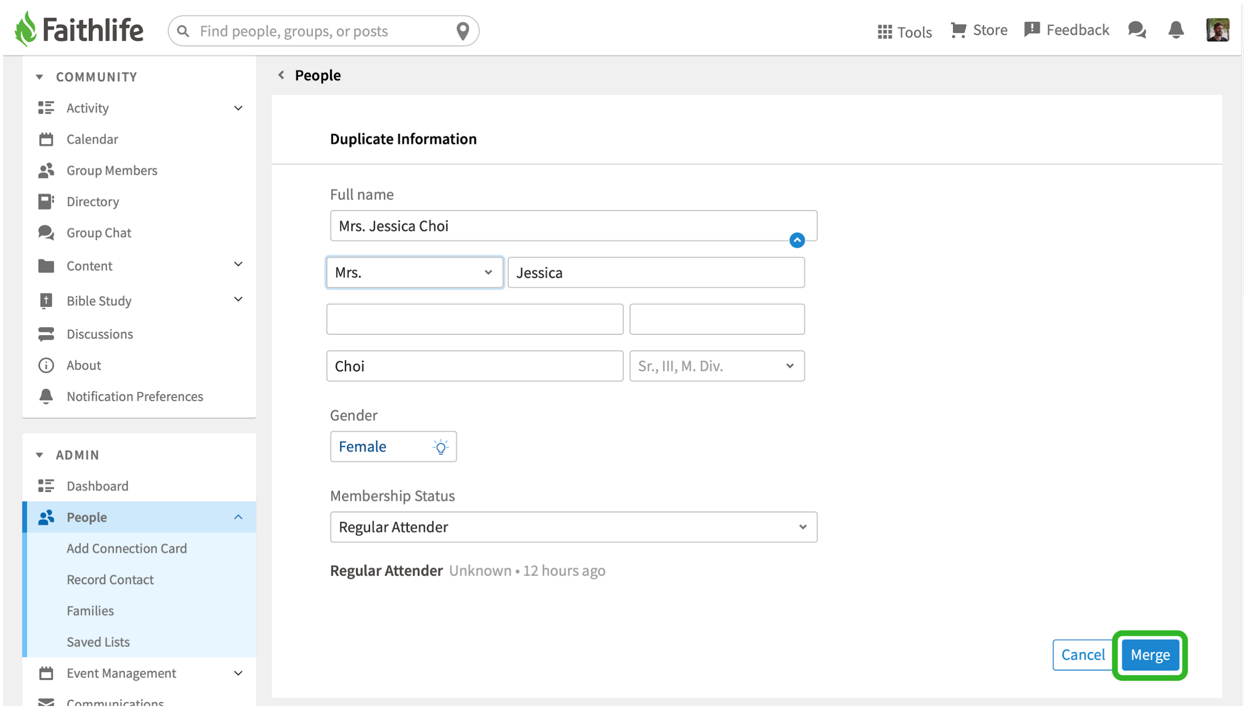
   Faithlife displays all information from both records. If the two records contain different information, such as birthdate or marital status, select the information you want to retain by clicking the corresponding radio button.

   Delete obsolete or incorrect information, such as a phone number or address, by clicking the **Trash** icon . Some fields, such as **Status**, default to the most recent entry. To change the field entry, expand the drop-down menu and select your desired entry.

   Faithlife allows you to retain multiple addresses and phone numbers. To edit the tags, expand the options by clicking the **Arrow** icon .

3. Merge records

   Click **Merge** to combine the records. Faithlife completes the action, displays **All changes saved!** and returns you to your People records.



Note: If you make a mistake or discover information requiring further investigation, click **Cancel**. No changes are made, and Faithlife returns you to the main People section. The notification about potential duplicates continues to display in the People section.

Merge records from your list

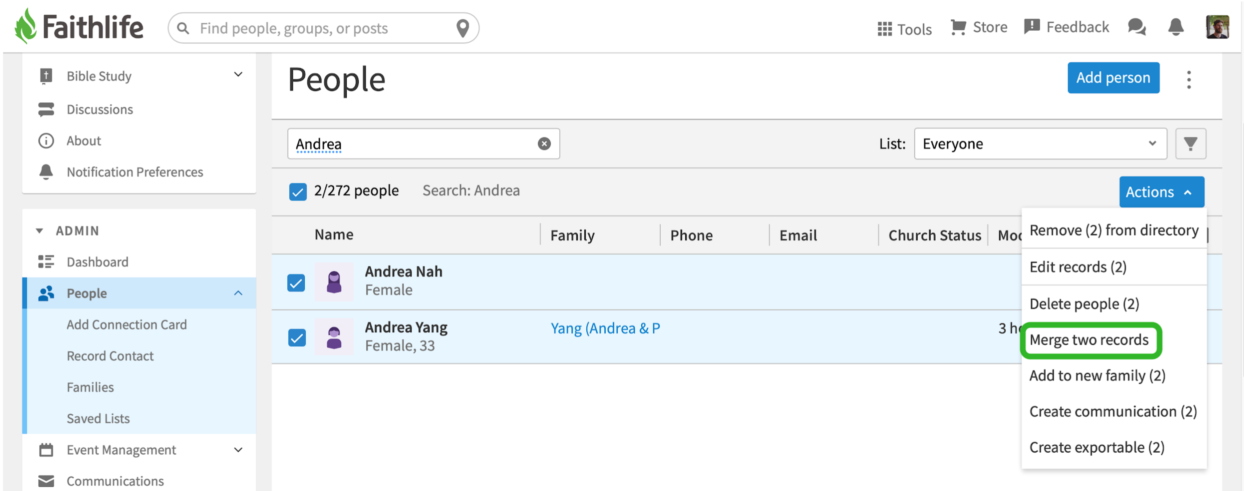
If you discover duplicate records that Faithlife has not identified:

1. Select duplicate records

   Check the boxes next to the duplicate records. (If you have more than two records that have been duplicated, such as three instances of a single person, select two records to merge; then repeat these steps again to merge the third record with the other two.)

2. Open Duplicate information panel

   Click **Actions** and select **Merge two records**.



3. Resolve duplication

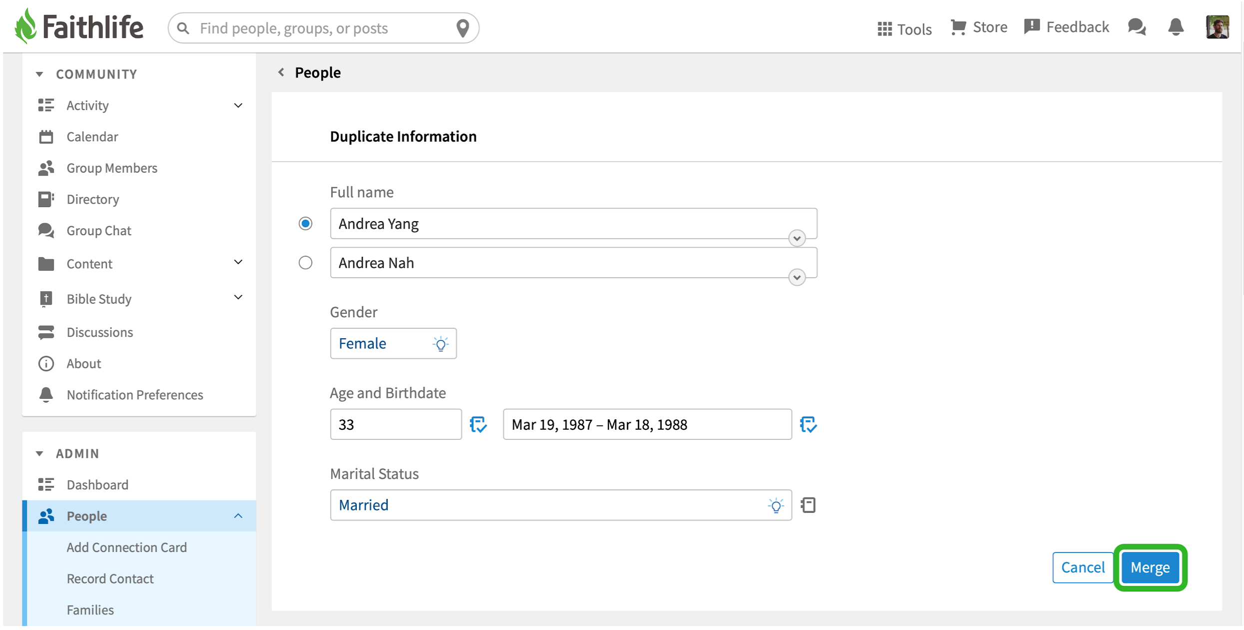
   Faithlife displays all information from both records. If the two records contain different information, such as birthdate or marital status, select the information you want to retain by clicking the corresponding radio button.

   Delete obsolete or incorrect information, such as a phone number or address, by clicking the **Trash** icon . Some fields, such as **Status**, default to the most recent entry. To change the field entry, expand the drop-down menu and select the correct entry.

   Faithlife allows you to retain multiple addresses and phone numbers. To edit the tags, expand the options by clicking the **Arrow** icon .

4. Merge records

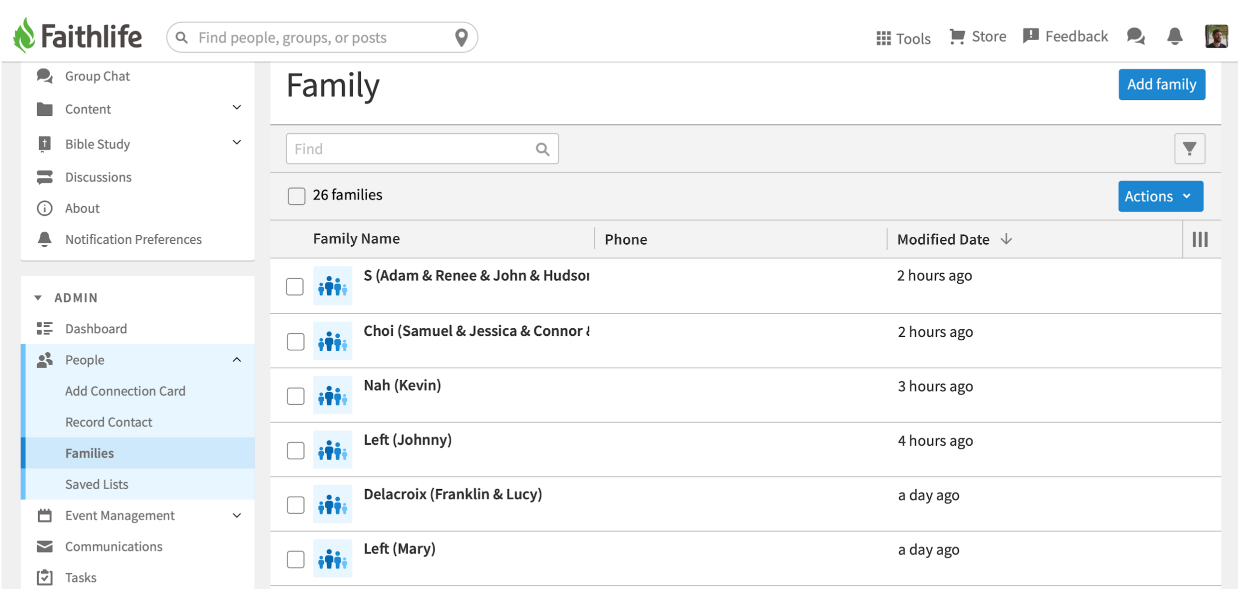
   Click **Merge** to combine the records. Faithlife completes the action, displays **All changes saved!** and returns you to your People records.



Note: If you make a mistake or need to investigate further, click **Cancel**. No changes are made, and Faithlife returns you to the main People section.

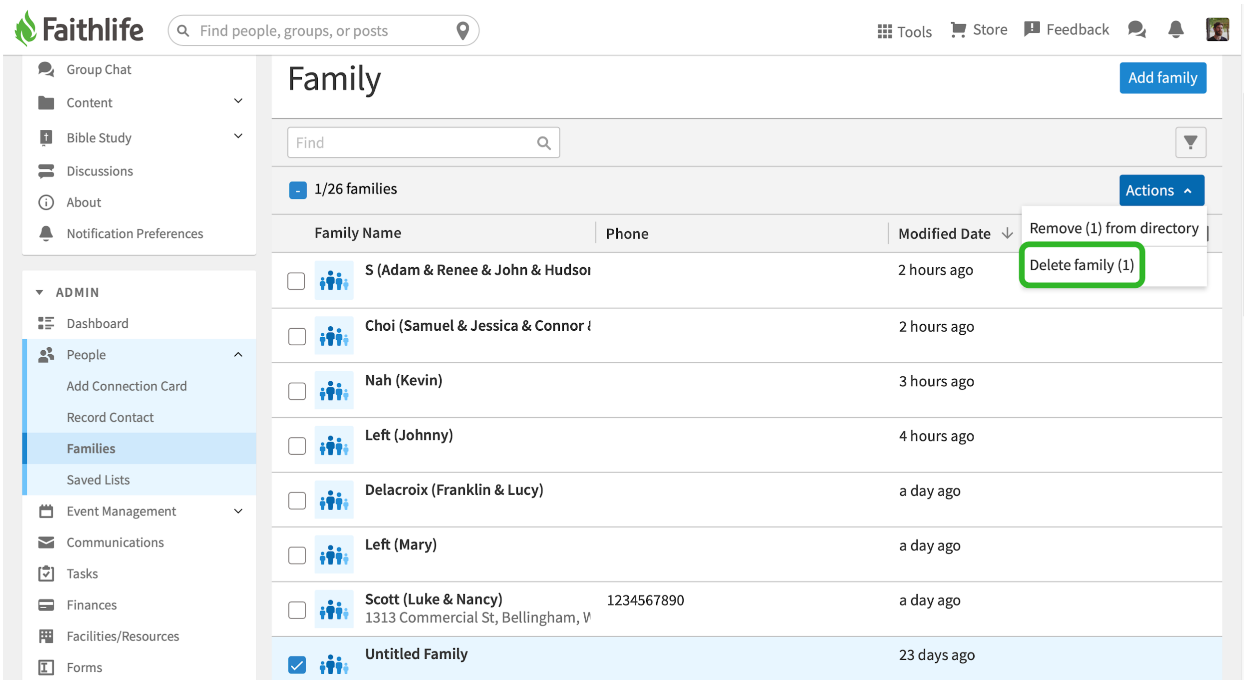
Manage Family Records

You can access, edit, and remove family records from the **Families** page.



Find the family record you want to modify by searching for it using the Find box.

- To view or edit a family record, select the family's name.
- To remove a family record, check the box beside the family record, then click **Actions > Delete Record**. This removes the family record but does not remove the individual person records associated with that family.

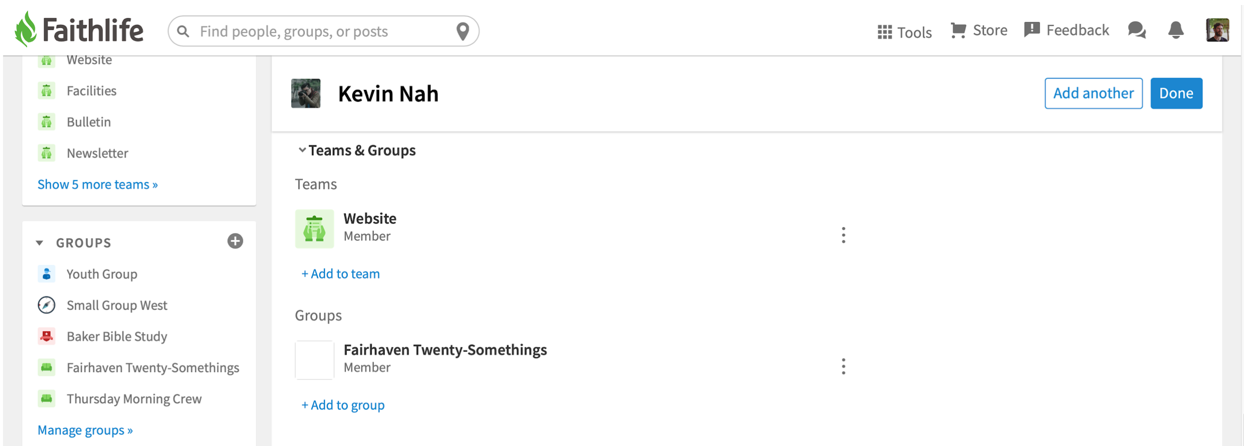


Assign People to Teams or Subgroups

You can assign people who are connected to your church group to teams or subgroups. If they're not yet connected, you'll need to invite them to be. Unlike invitations to your church group, assigning people automatically adds them to your subgroup or team (as long as they're already Followers or above in your parent church group). For this reason, it's usually best to invite people to your parent church group first and *then* assign them to subgroups and teams.

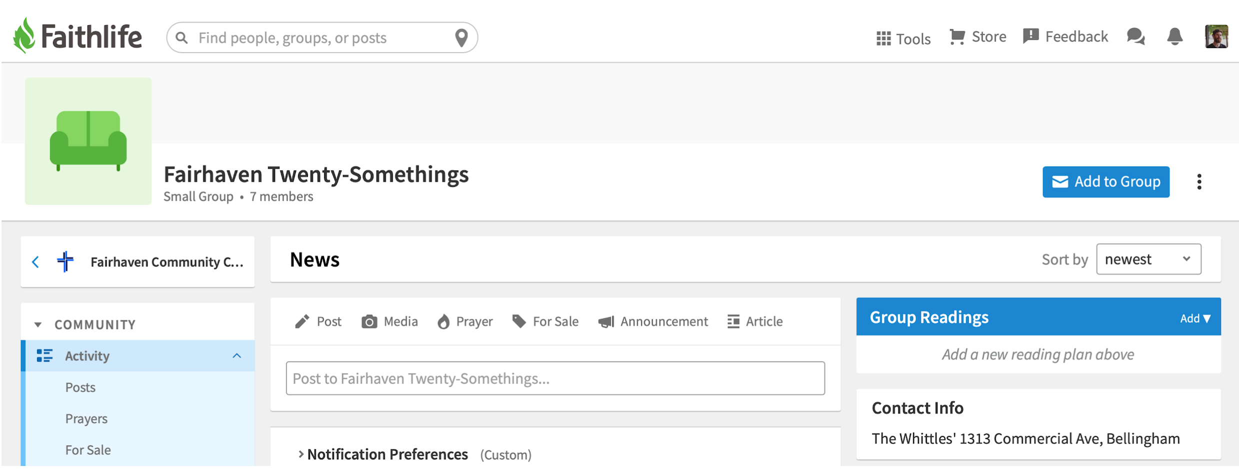
Assign people individually

As is mentioned in the What's in a Person Record section on page 10, you can assign a person to a subgroup or team from the Teams & Groups section of their record.



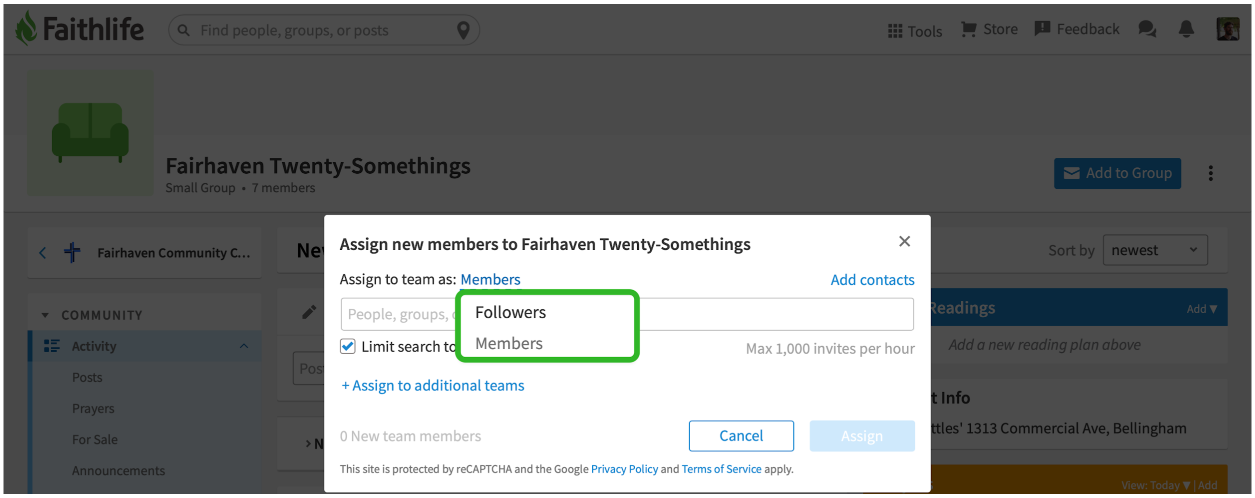
Assign several people at once

1. While viewing your team or subgroup, click the blue **Add to Group** button in the top right.



2. Choose your invitation level.

By default you will invite people as **Members**. To invite people as Followers, Moderators, or Admins, click **Members** and choose a different **Invite as** option. (Depending on your role in the group, not all of these options will be available to you.)



As a reminder, a person's role in your group determines the level of control they have over group content and permissions:

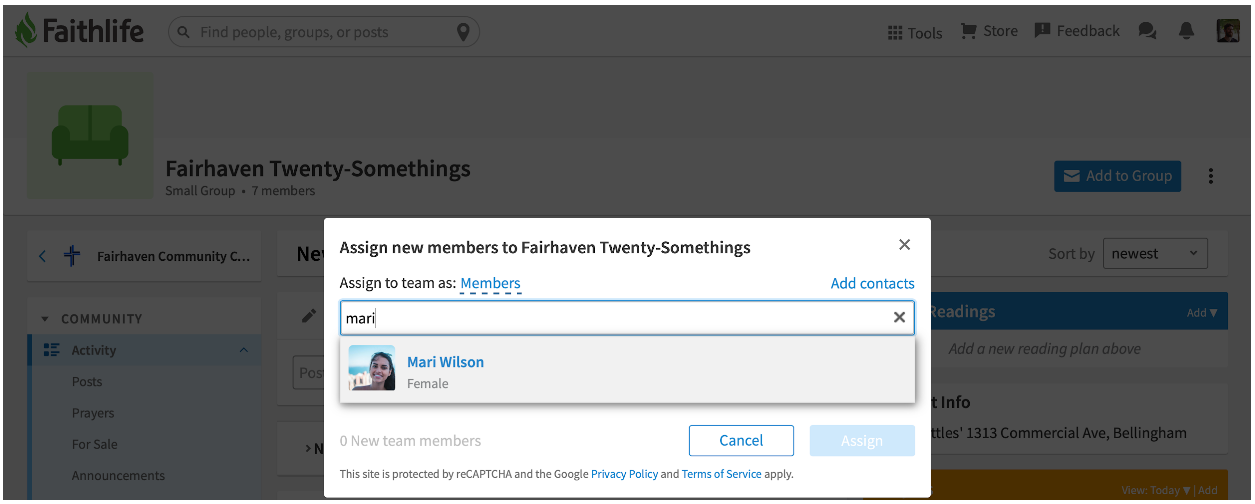
- **Followers** can interact with public content or content marked for followers.
- **Members** can actively participate in the life of the subgroup/team by posting on the activity homepage, sending messages to others, and interacting with content.
- **Moderators** help manage subgroup/team content and have higher access to settings and permissions.
- **Admins** have complete control over subgroup/team content, settings, and permissions.

Note: Admins of your subgroup/team can customize your group content permissions for each of these roles.

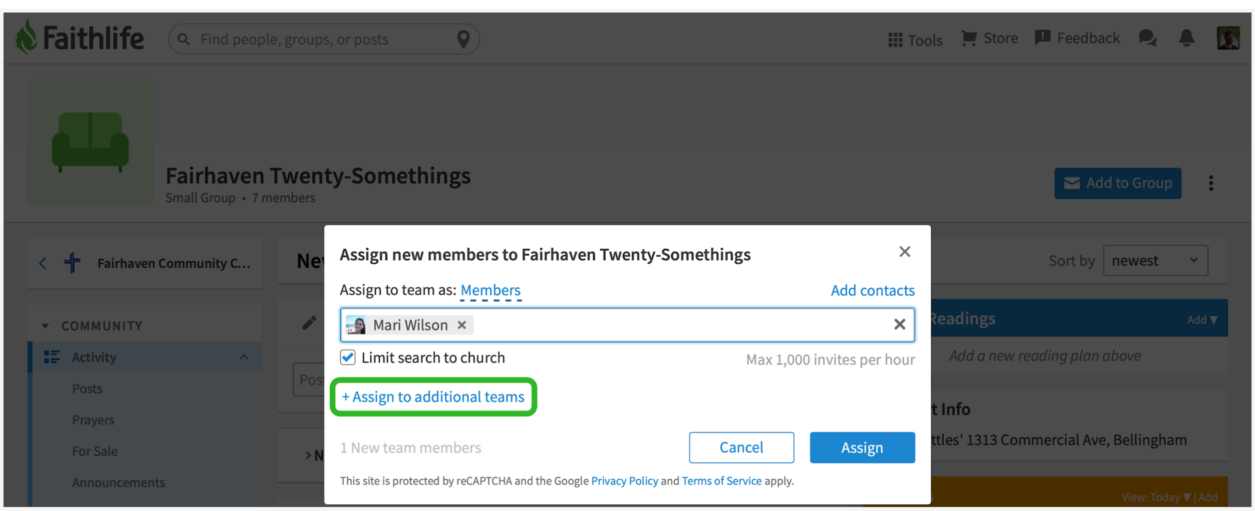
3. Add invitees.

We recommend searching for people by name, though this assumes they have a Faithlife account. As a general rule, it's usually best to invite people to your parent church group first and then assign them to subgroups and teams. This process makes it easier on you, as people who already belong to your parent church group can be added to your subgroup or team membership without additional confirmation on their part. To limit the search to people already in your church group, leave **Limit search to church** checked.

Note: You can also add people by email address or bulk add people to your invitation by clicking **Add contacts** and uploading a .csv file with email addresses in a single column. The email addresses in the .csv files will auto-populate the **To** field. Faithlife only imports email addresses from the .csv file. Any other data in the .csv file will be ignored.



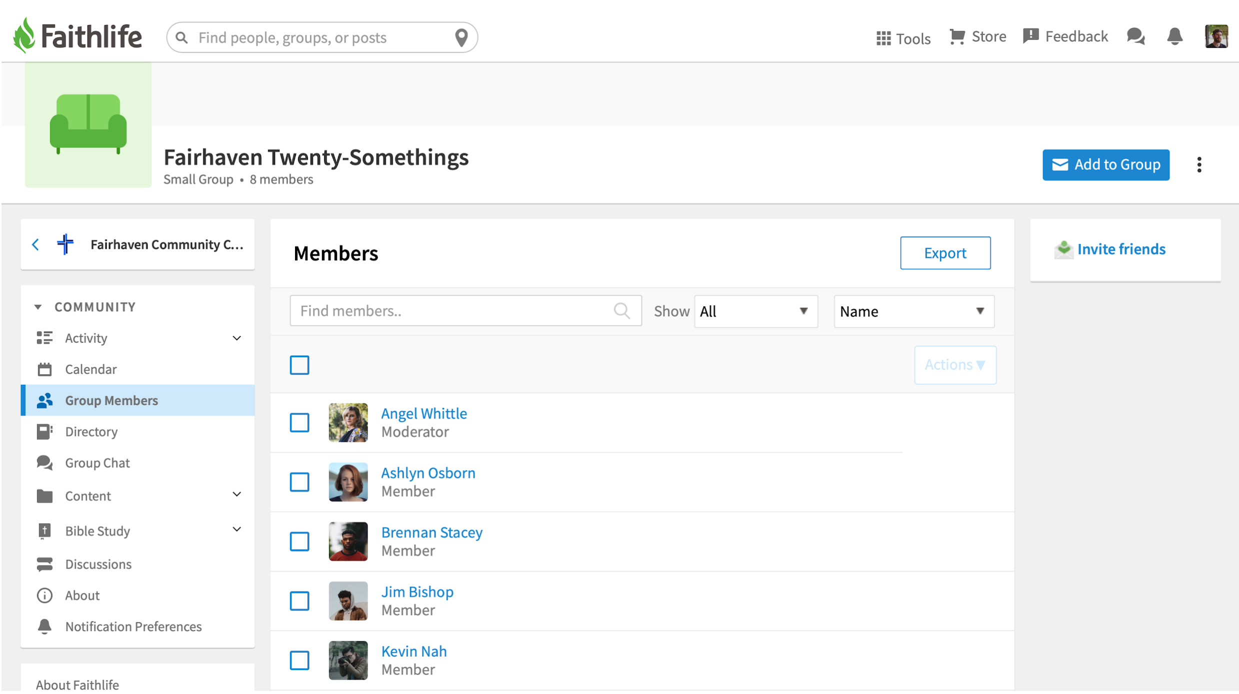
Note: You can assign people to multiple teams at the same time. Click **+Assign to addition teams** and choose another subgroup or team connected to your parent church group.



4. Finalize and click **Assign**. Depending on your selections above, one of the following will occur:
    - **Assignee is already a part of your parent church group:** the assignee will be added to your subgroup/team membership without confirmation.
    - **Assignee is not a part of your parent group:** the assignee will receive an email inviting them to create a Faithlife account (if necessary) and join your parent church group. Upon accepting the parent church group invitation, they will be added to your subgroup/team without additional confirmation.

Note: The above options assume you've checked "Send an email inviting assignees to create a Faithlife account" for any assignees who are not a part of your parent church group. If you leave the option *unchecked*, these assignees will *not* be notified but a record will be created in both the subgroup/team and the church group. You will then need to officially invite/assign people from the Members section of your subgroup/team at a later time.

To view someone's status in your subgroup/team, select **Group Members** in the left-hand sidebar.



Note: To change an existing person's status, withdraw an invitation, or remove someone from your subgroup/team, select the person's row in your Members section, expand the **blue Actions button**, and choose your desired action.

PART 3

Use People Records

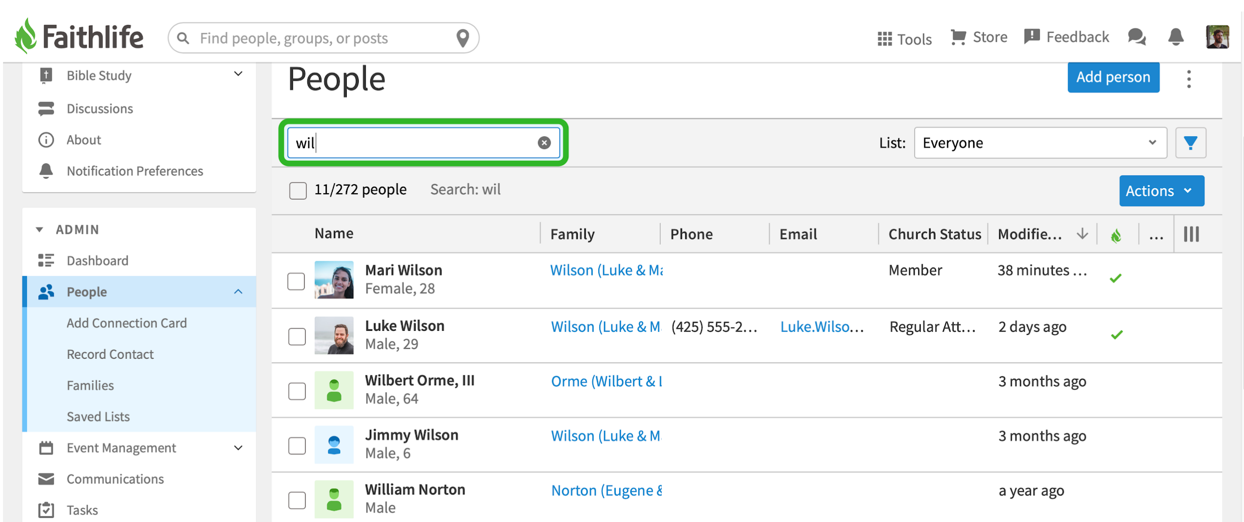
Search and Filter People Records

Faithlife gives you the ability to easily find any person in your church group and filter your person records to view lists of people that meet various criteria, such as everyone who has a birthday this month or everyone who has not attended a membership class.

Note: The ability to search and filter person records is limited to group Moderators and Administrators.

Search people records

To find and open a person record, simply type the person's name (or a portion of it) in the **Find** bar under the **People** heading. As you begin, Faithlife filters your People records based on names containing the string of letters you've entered. In the example pictured below, entering **wil** locates Mari Wilson, Luke Wilson, William Norton, and eight other records.



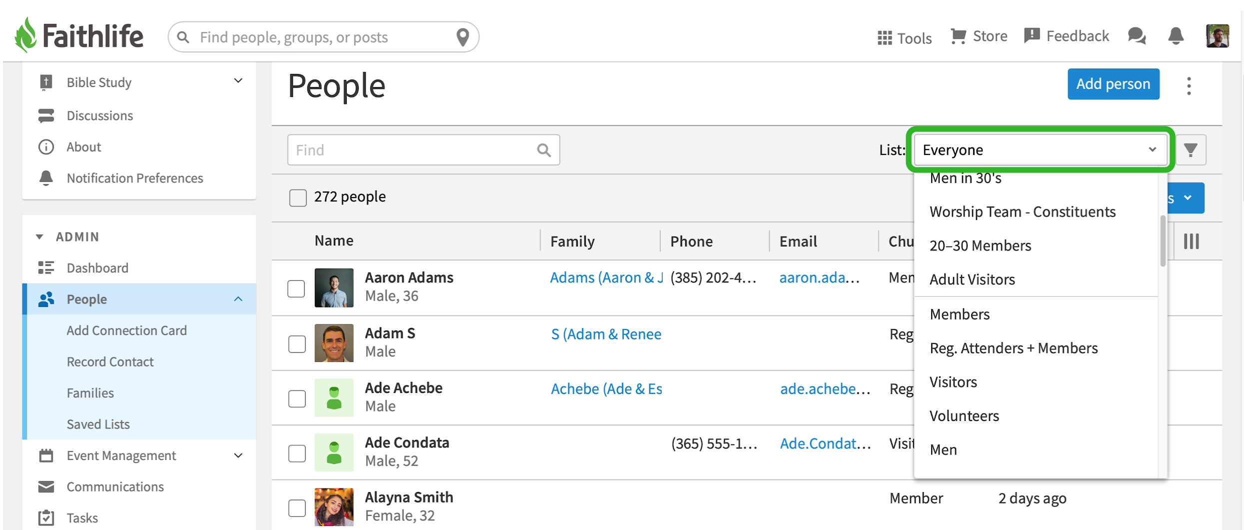
Note: You can use the Find bar to search for records using any field category. For example, entering **member** displays all the members of your church. (Keep in mind that a member of your Faithlife group may not be a member of your church.)

Filter people records

Where searching allows you to find particular people and displays only those records that match your search terms, filtering allows you to adjust the displayed records by criteria such as membership status or gender.

Filter using a preset list

1. Click the box next to **List** to expand the available lists.
2. Click a list name to select it and display all of the records it contains.
   For example: Selecting **Members** displays a list of people who have been entered as Members.



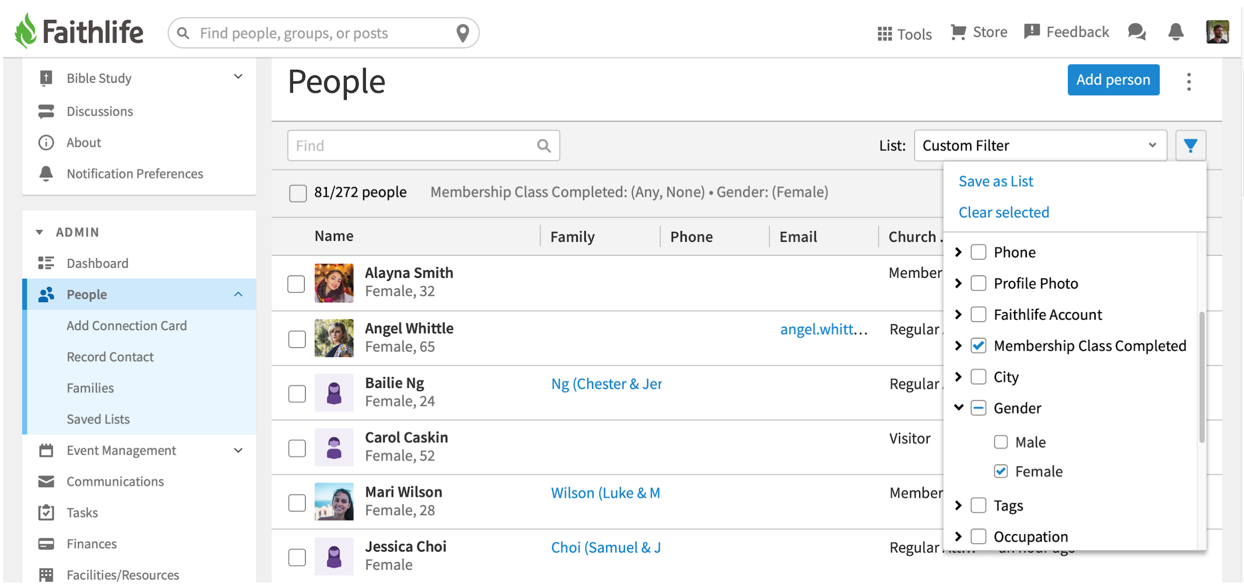
Choose fields to filter

1. Click the **Filter** icon  to display available fields to filter your records.

2. Select field(s) to filter.
   Check the box next to a field to select all the labels in that field.
   For example: checking the box next to **Gender** selects all records that are labeled with a response in this field.

   OR

   Expand a field by clicking the **>** and select individual labels under the field heading.



3. Faithlife filters your records as you select labels.

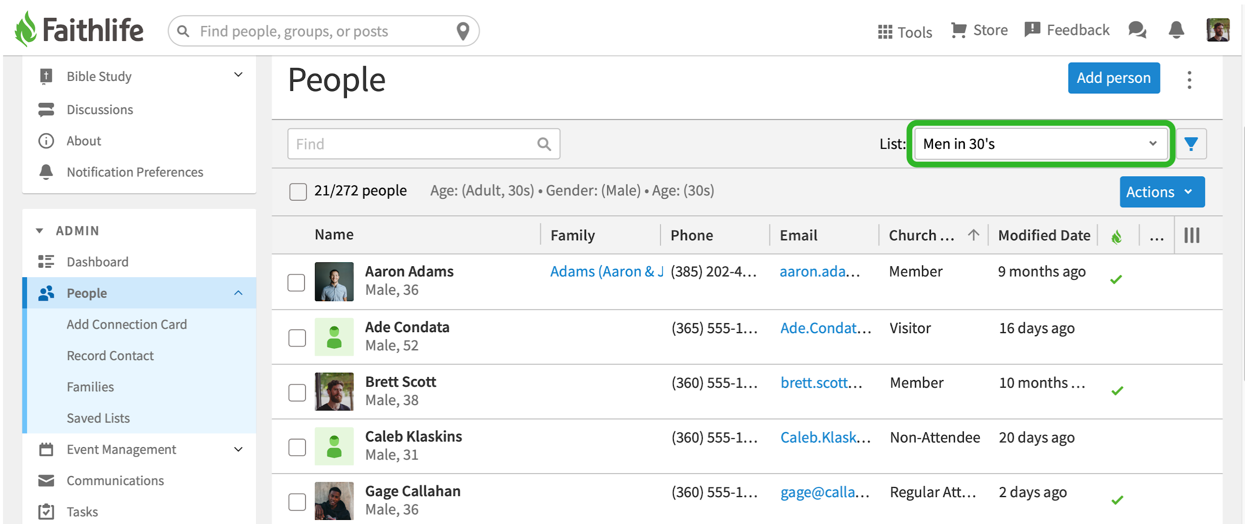
   Note: You can refine a preset list with additional labels to create a custom list. For example, you can select the list labeled **Men** and add **Age** with the **30's** label. This creates a list of all the men in your church who are in their 30's.

Save a filtered list

You can save a filtered list to use later.

1. Click the **Filter** icon and apply your desired filter.
2. Select **Save as list**.
3. Enter a name for your list.

For example: If you refined a preset list as described above (selecting **Men**, **Age,** and **30's**) you could name this list **Men in 30's**. You can find your saved list any time by expanding the **List** menu.

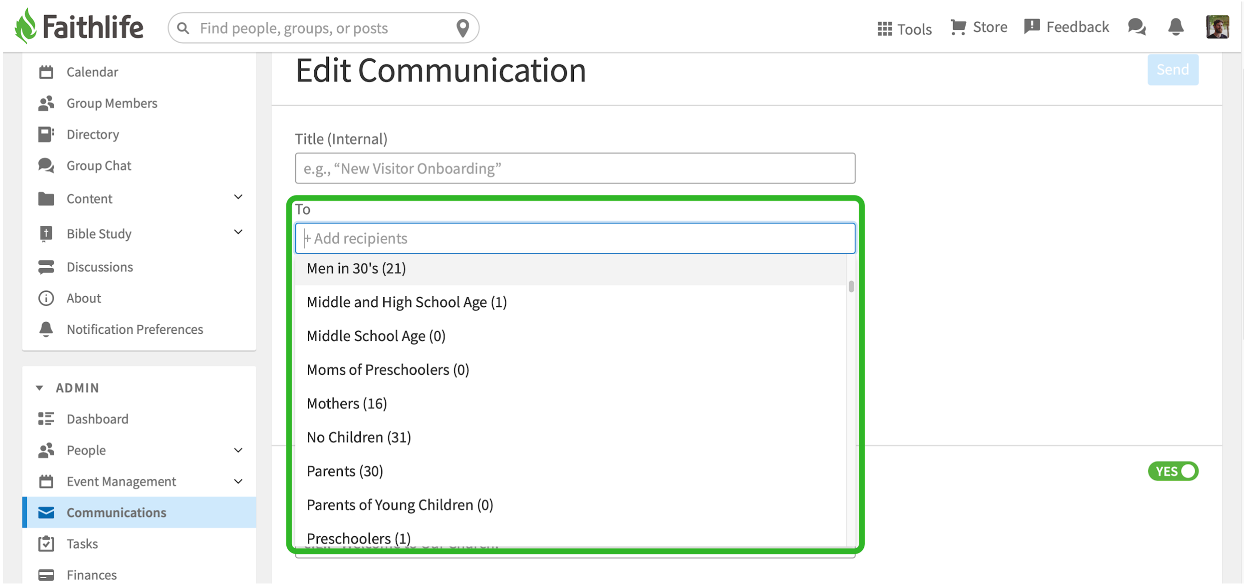


Use a filtered list

Saved lists are used across Faithlife to help you stay organized, to aid your communication and to access specific groups of people. Among other uses, you can use Saved Lists when sending communications and creating exportables.

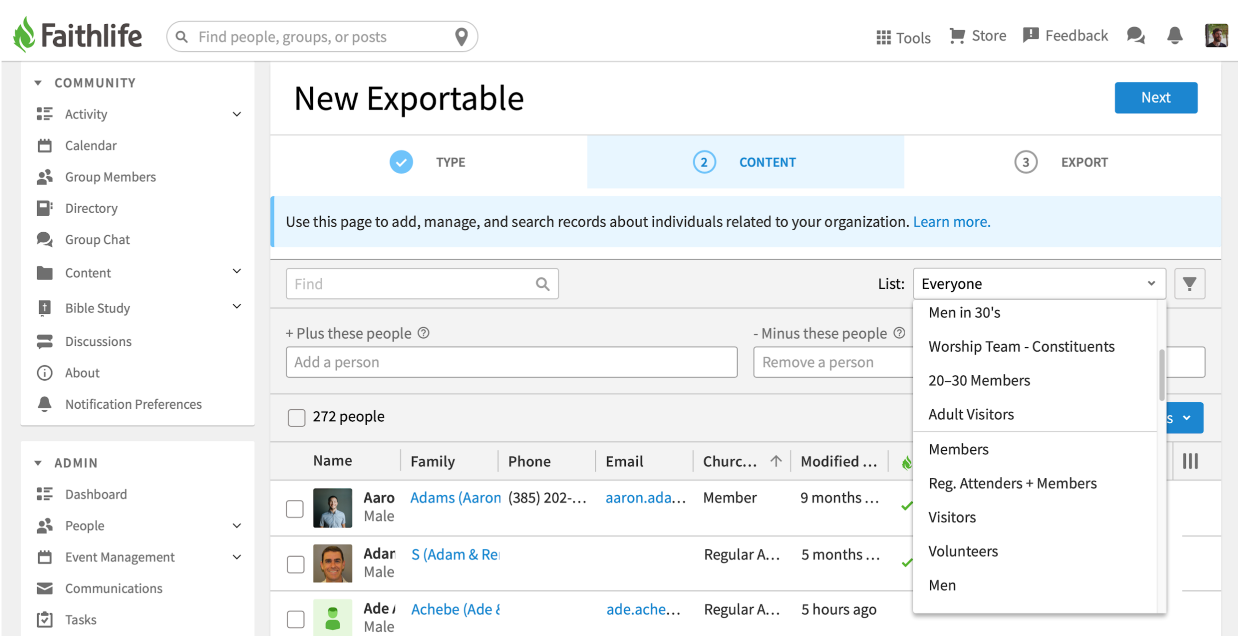
Communications

You can send communications to any saved lists. Select **Communications** in the **Admin** panel and click **Add communication** to create a new communication. To send the communication to your saved list, select it in the **To** input field. You can scroll and select it from the dropdown or search for your list and select it.



Exportables

You can create exportables like address labels, directories, name badges, and more using saved lists. To begin, expand **Reporting** in the **Admin** panel of your Faithlife group, click **Exportables**, and . Next, choose your exportable type. Using the dropdown, select your saved list.

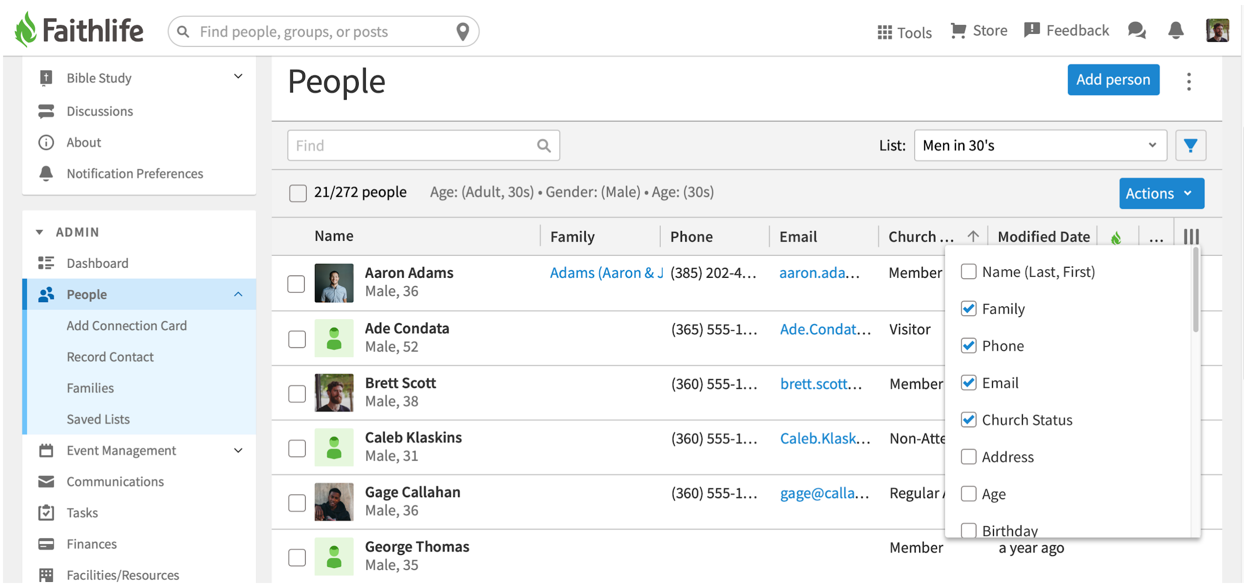


Choose Which Fields Display

You can choose which fields to display on your main People page.

1. Expand the Columns menu.

   Click the **Columns** icon to expand the menu of available fields to display.



2. Select fields.

   Check a box to display a field on the main People page. Uncheck a box to hide that field from the display.

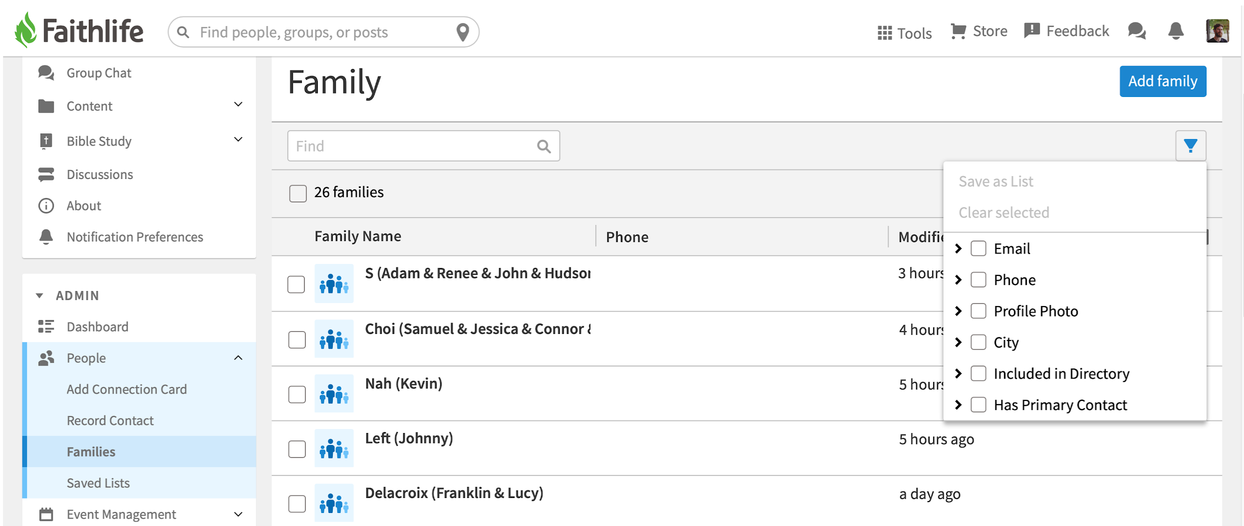
   Note: Faithlife automatically resizes the columns to fit all selected fields on your screen. You can manually adjust each column's width by clicking the vertical dividing line in the field header and dragging it to the left or right.

3. Order your display fields.

   Drag and drop a field heading to move it to a different location on the display.

Filter Family Records

You can filter your family records by a range of criteria, too. To do so, click the **Filter** icon and check the boxes beside the filters you'd like to apply. Every family record that matches the filters you've selected will be displayed.



Print from People Records

With the Exportables tab, you can quickly print or export content from your people records for use in mailings, meetings, or other physical communications. To create exportable media, begin by expanding **Reporting** in the **Admin** panel of your church group and selecting **Exportables**.

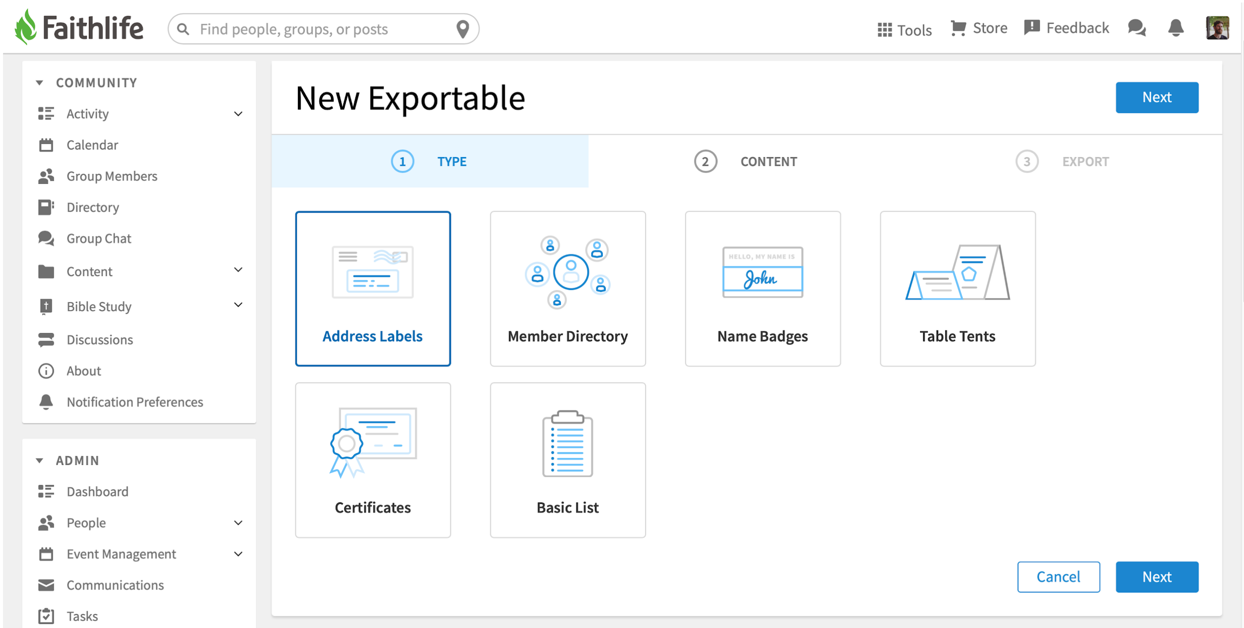
Then, follow these simple steps:

1. Click **Create exportable** at the top to begin a new project

   Note: All of the previous exports you've created display below. You can rerun any of these projects by clicking its name, selecting from the available options, and printing or downloading the exportable as shown below.

2. Choose an exportable type.

You can create exportable media like address labels, your member directory, name badges, table tents, certificates, and more. Select an exportable type and click **Next**.



3. Choose your content.

   Select the people records you want to include in the printing. If you've created a list, you can select it from the dropdown. Alternatively, you can filter, sort, and search the table below to select the people you want to include in your printing. When you're ready, click **Next**.

   Note: You can search, filter, and sort the displayed people records just as you would from the Directory or the People tab.

4. Download or print the exportable.

   Select from the available options for the type of exportable you selected, give the project a recognizable name, and choose whether to **Download** or **Print** your project.

   Note: In the dropdown next to Download, you can choose to download as HTML, PDF, or Plain Text.

5. Click **Done** to save the exportable.

   Any exportable you've saved displays in the main **Exportables** tab.

Custom Reporting

As an admin of your Faithlife group, you have the ability to run reports, both simple and complex, on your people and family records. The reporting page displays *all* of your people and their data in a dynamic, customizable table. You can use reports to find gaps in your database, create reports about your community, help you care for your people, and so much more. And because these reports are saved for your group, and not for you as an individual, every admin of your church group can access and edit them.

Note: Financial reporting is only found within the Finance Team and is not included in these reports.

Build a custom report

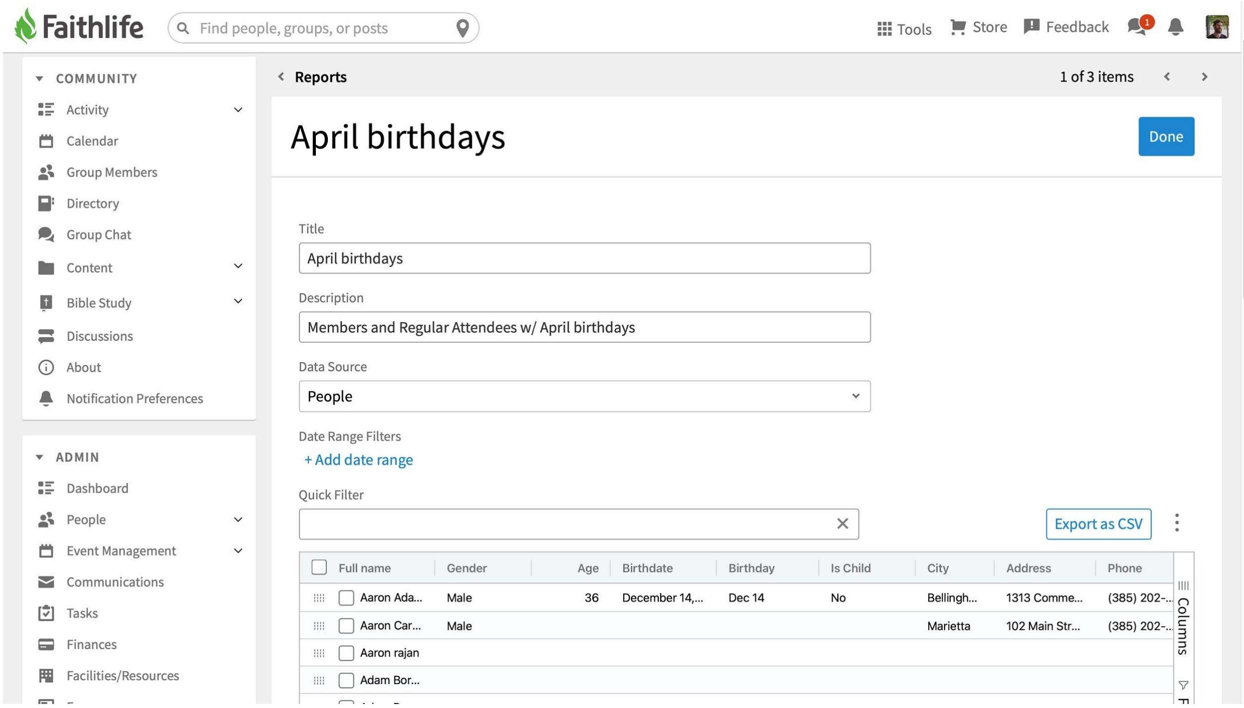
Let's say you want to see every member and regular attendee of your church with a birthday next month. Since all of the fields in your people records are queryable, you can quickly filter your data to find your answer.

Here's how:

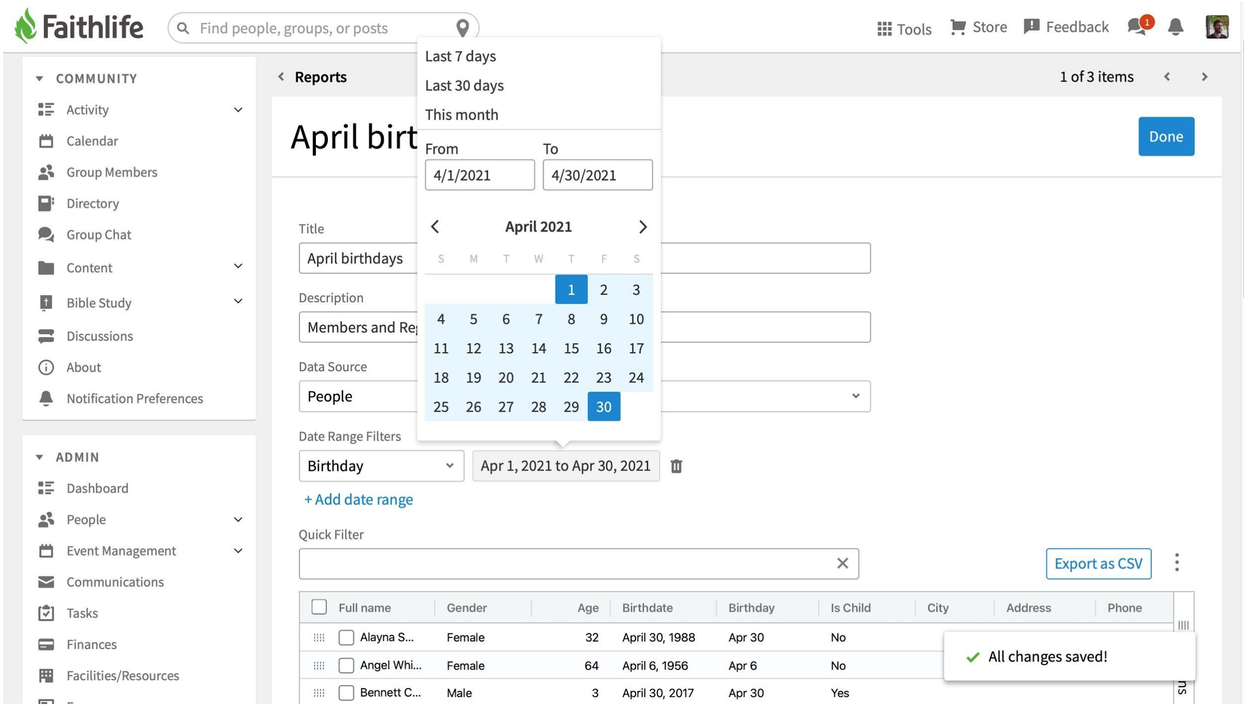
1. Navigate to the main page of your Faithlife group.
2. Scroll down to the Admin panel.
3. Click **Reporting** to open the Reports page.

Note: Every report you create is accessible and editable here.

4. Click **Create report**.
5. Give your report a recognizable title (like April birthdays) and provide more details in the Description field if you want.



6. Select the data source for your report. Since we're looking for information on people in this example, we'll keep the report set to query people records, but we can also choose family records or facilities/resources.
7. Click **+Add date range**.
8. Select birthday from the drop-down menu.
9. Enter your date range manually or by clicking dates within the calendar.
   This immediately filters your displayed records to people with a birthday in your set date range.



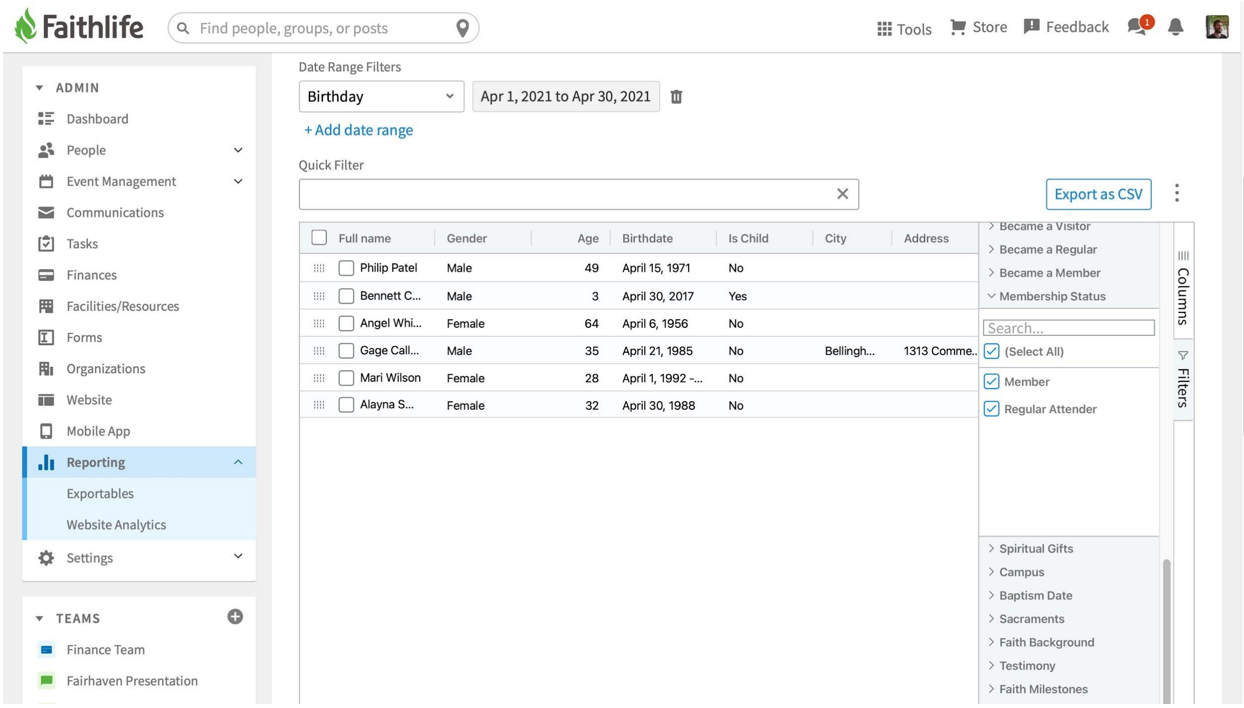
10. Choose what information to display in your table and how you want to filter your records.

Select Columns and filter displayed records

You'll notice that the right-hand column of your table features **Columns** and **Filters**. Clicking these allows you to adjust which columns of data your table displays and which records will populate the table. Clicking them again hides the Columns and Filters selector.

Note: You can also adjust Columns and Filters from the Columns menu (discussed below).

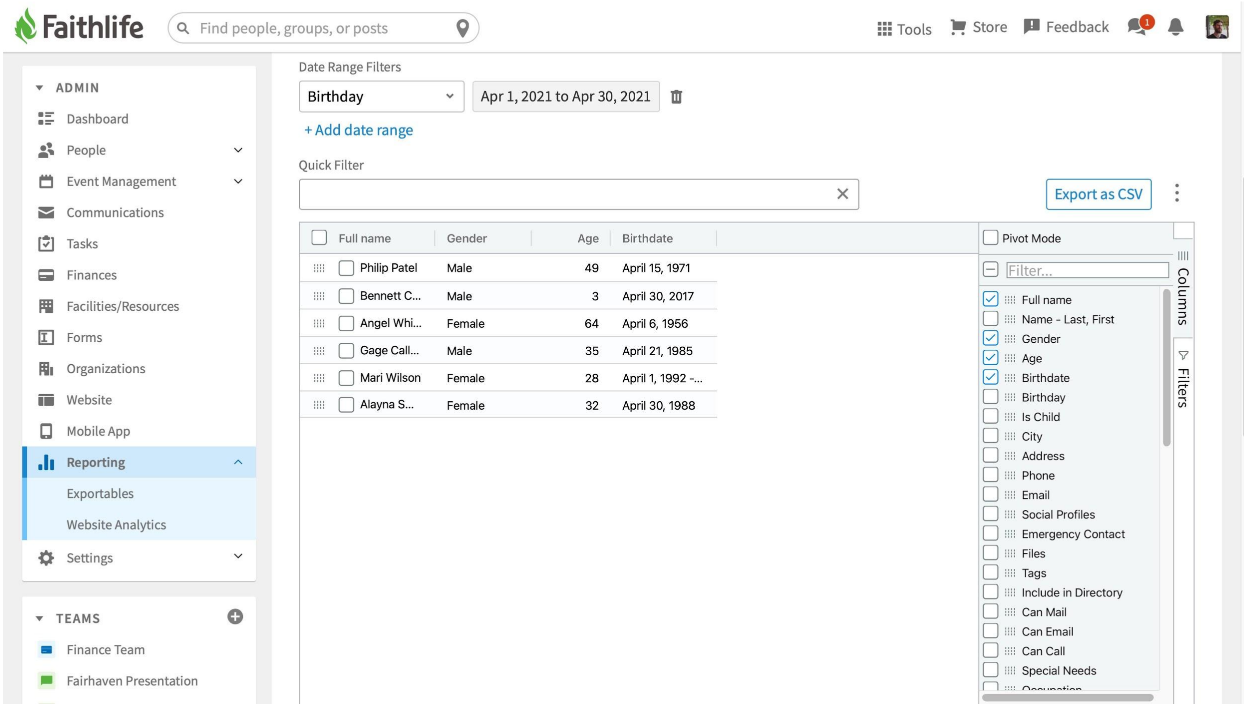
Since we want to see which members and regular attendees have a birthday next month, we'll click **Filters** and scroll down to **Membership Status**. To view only members and regular attendees, simply deselect the options you don't want to display.



Note: Faithlife saves your report as you work, so you don't need to worry about losing your table if something unfortunate happens.

Feel free to add additional filters to further limit the records displayed. Note that filters work like AND operators. This means that when you select data from multiple categories, Faithlife will only display records that match all of your selected criteria.

To adjust what data your table displays, click **Columns**. Not only does this adjust the table in your browser window, it also affects the data that displays when you **Export as CSV**. The fastest way to limit the displayed columns is by clearing all the selections and choosing only the ones you want.



Note: Filters are independent of the columns displayed. So just because you want to know which members and regular attendees have a birthday next month doesn't mean you need to display their membership status in your table.

Additional options from the Columns menu

When you hover over a column header, you'll see the **Column** menu icon appear. Click this to pin a column in a particular location, autosize the selected column or all of them, group the displayed records by the data in that column, and reset the columns to the table's previous display settings.

This menu also houses the same filter and column display options discussed above.

Start with a Community Report

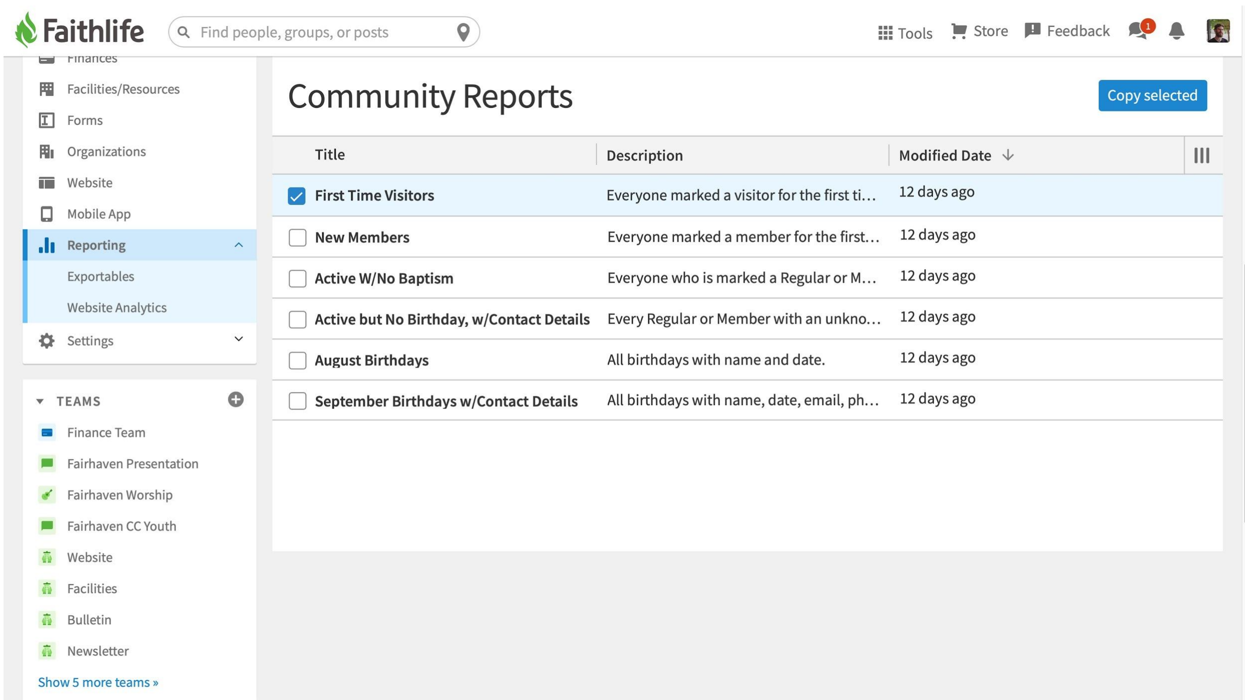
Community Reports are premade reports provided by Faithlife or by another church.

Note: Don't worry. These reports share only the filtering criteria, not your data.

You can add any Community Report to your group's reports with just a couple of clicks.

Here's how:

1. Scroll down on the Reports page until you see the Community Reports section.
2. Check the box next to a report you want to use.
3. Click **Copy selected**.



This adds a copy of the report to your Reports section at the top of the page. Simply click its title to open and edit it.

Export your report

Once you've finished customizing your report and adjusting which columns are displayed, click **Export as CSV** to download an editable spreadsheet for offline use.

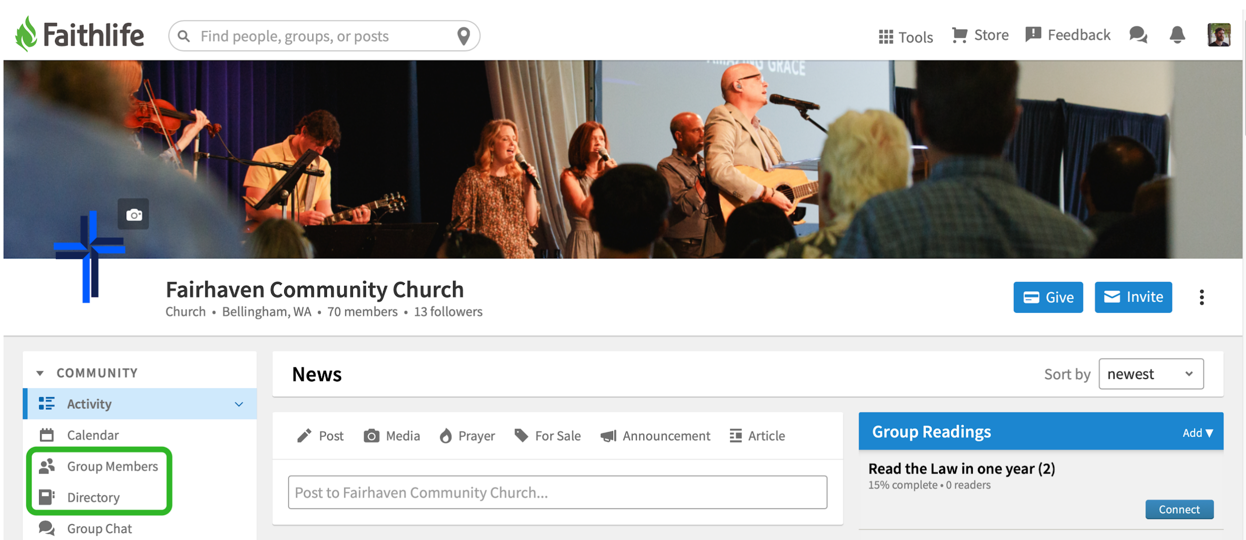
Use the Directory

As is mentioned above, the directory displays the names, contact information, and other relevant details for every *Member* or *Regular Attendee* in your group. Although the Directory contains information about individual people, the church group owns and manages the displayed information. Only **Admins** or **Moderators** of your group on faithlife.com can change Directory information. Members can view all details made visible by admins.

Directory or Group Members—What's the Difference?

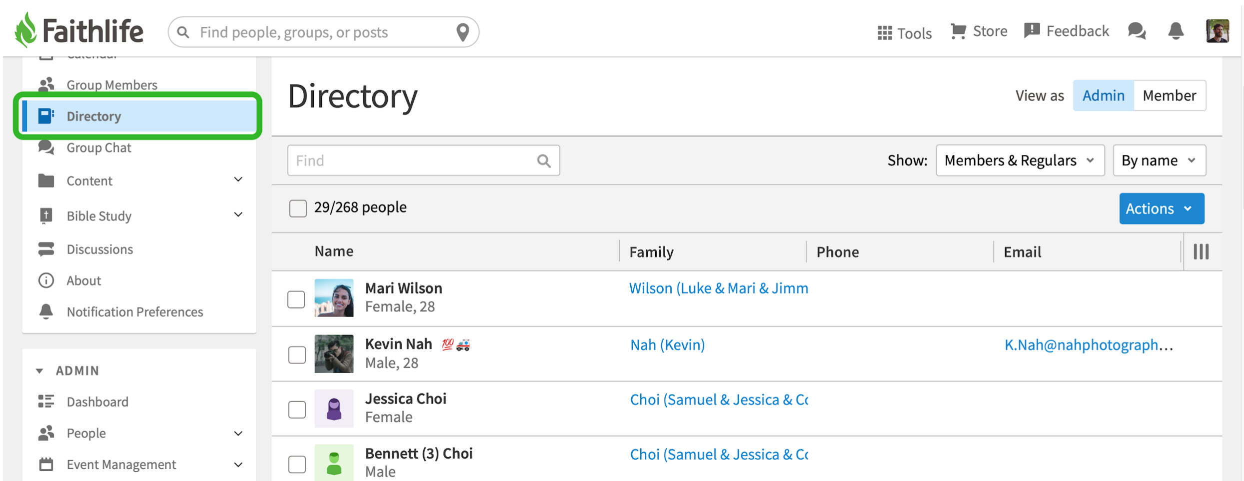
The Community panel of your church group includes two different membership lists:

- **Group Members**: displays those who are followers, members, moderators, or admins of your Faithlife group.
- **Directory**: displays people records of a church group with the church status of *Member* or *Regular Attendee*.



View the Directory

The Directory is available to anyone in your group, depending on your group privacy settings (learn more below). To open your Directory, simply click **Directory** in the left-hand sidebar.

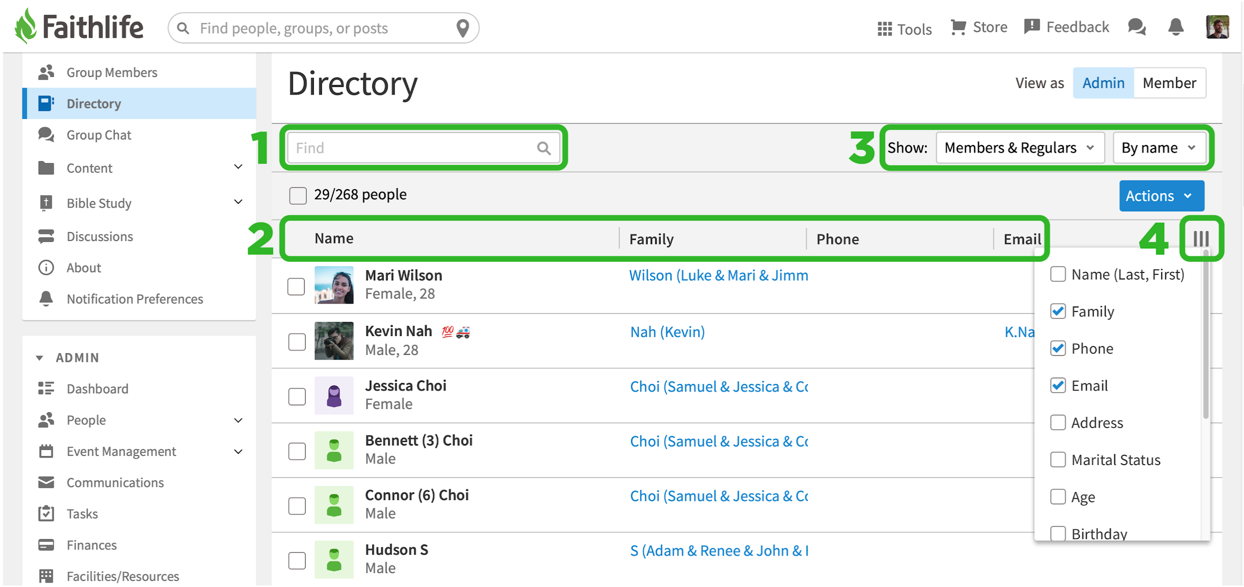


If you are an **admin** in your group, you can choose to view the Directory as an **Admin** or a **Member** via the **View as** toggle above the Directory.

- **Admin/Moderator view:** Shows all information for those with a church status of *members* or *regular attenders* whether or not you've chosen to hide that information from your public-facing Directory.
- **Member view:** View only people (and their details) made visible by admins/moderators.

Search, Sort, and Filter the Directory

Both **Admins** and **Members** can search, sort, and filter all Directory information visible to their respective role within the Faithlife Church group. The process is very similar to that of searching, sorting, and filtering people records described above.



1. **Find Bar:** Search visible Directory entries for any available information (e.g., first or last name, email address, area code, etc.).
2. **Sort:** Click a column header (e.g., "Email") to sort your current view by the column's data.
3. **Filter:** The two drop-down menus allow you to (1) filter the Directory by role within the Faithlife group and/or (2) by either name or family.
4. **View Columns:** Click the **View columns** icon ||| to choose which columns display (Admins see more column options than Members).

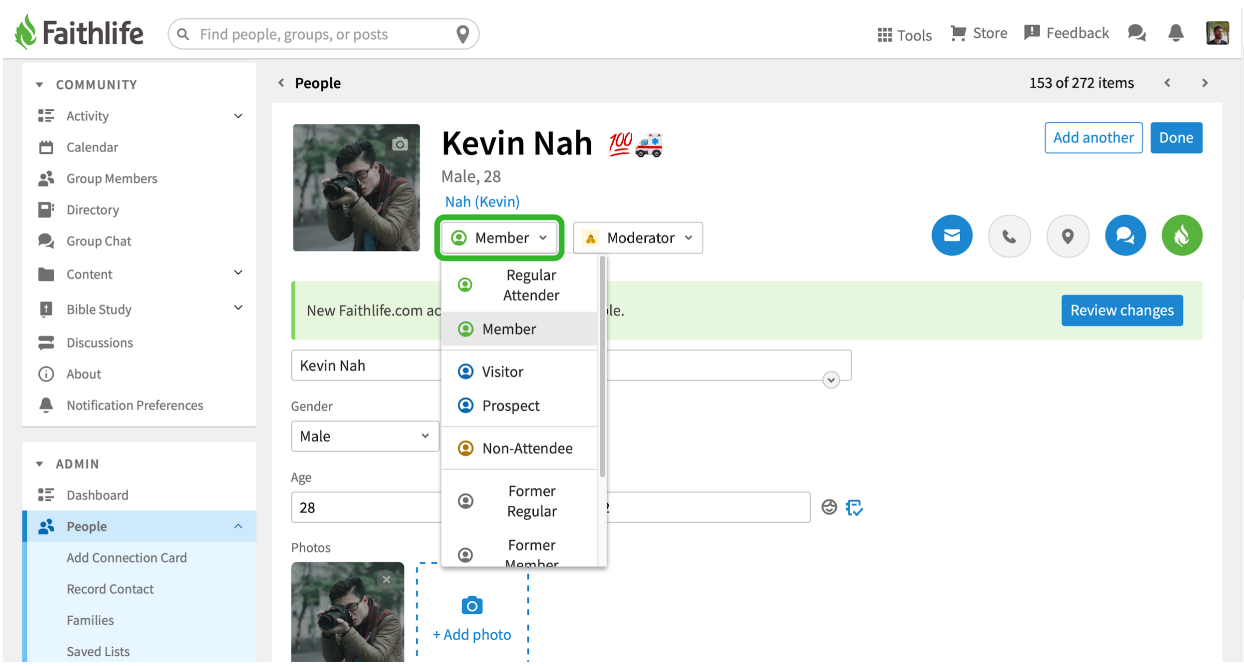
Note: If you've invited a new person to your group via the **blue invite button** above the Directory, **"Visitor"** will be prepended to their email address in the name field. Once they accept your invitation, [an admin can update their name field](#).

Add People to the Directory

Admins can add or remove people from the Directory individually or in bulk. Keep reading to learn how.

Add or remove an individual

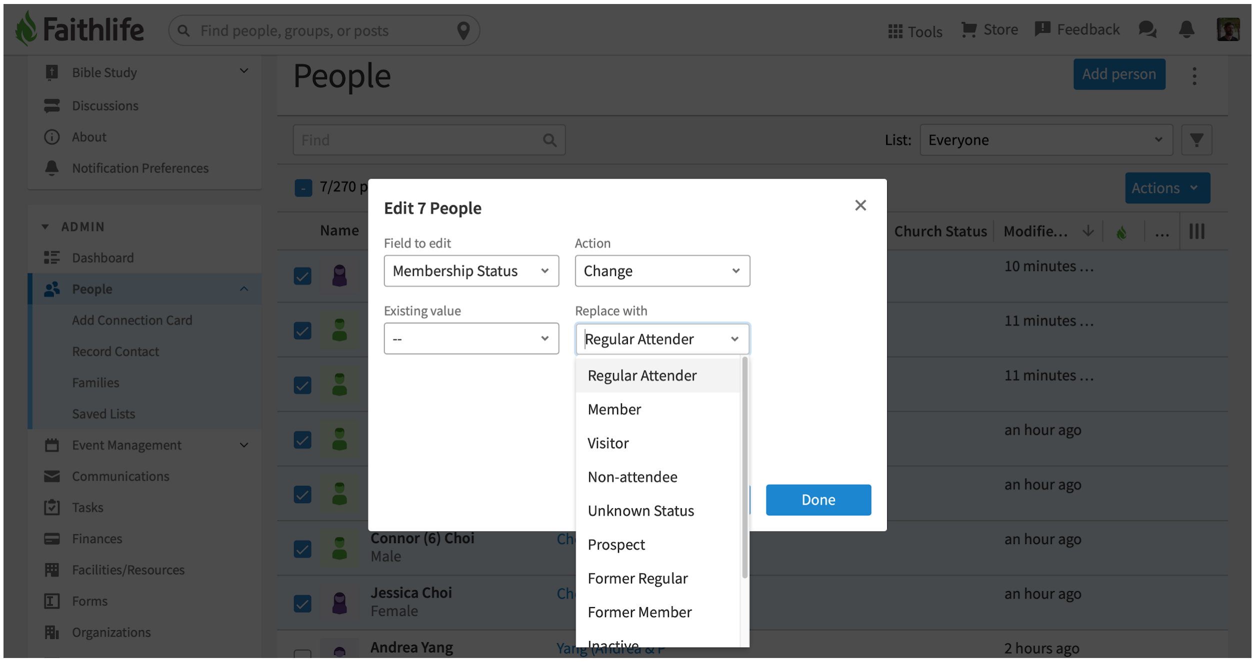
1. Click **People** in the **Admin** panel of your church group. (Note: you must be an admin or moderator of your church group.)
2. Click any person record to open it and make changes.
3. At the top of each record, the person's **Church Status** appears in the left drop-down menu. Click the dropdown to change the status. Each person with a church status of **Member** or **Regular Attender** will show in your Directory.



Note: Each person must also have **Include in Directory** checked under the **Personal Details** section of their person record. It is checked by default.

Add people in bulk

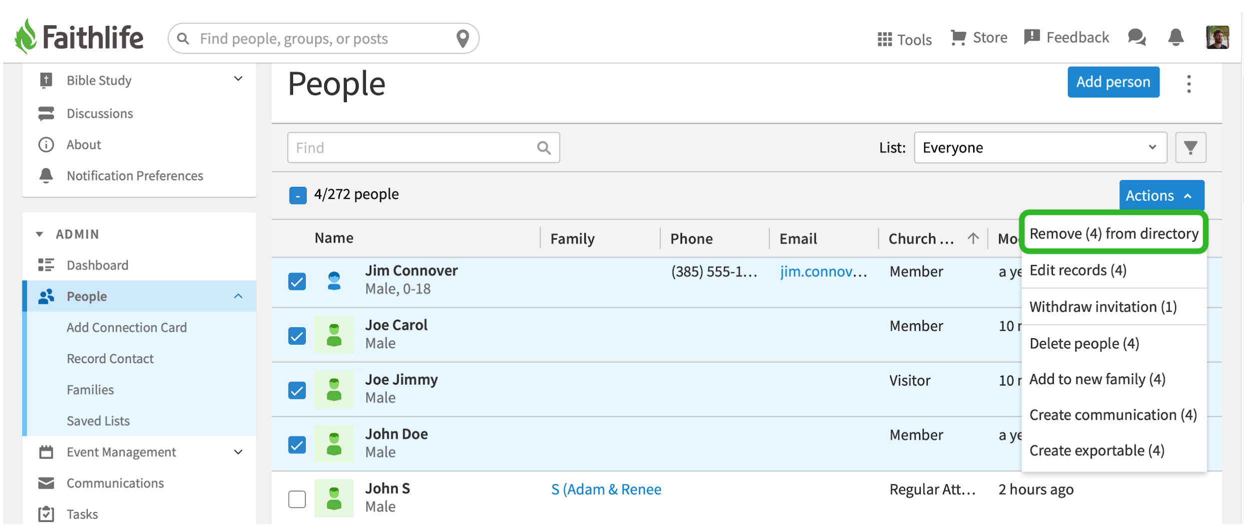
1. Click **People** in the **Admin** panel of your church group. (Note: you must be an admin or moderator of your church group.)
2. Select multiple rows.
3. Click the **Actions** button and choose **Edit** to edit multiple records at the same time.
4. Change the **Membership Status** to either *Regular Attender* or *Member* and click **Done**.



Note: Each person must also have **Include in Directory** checked under the **Personal Details** section of their person record. It is checked by default.

Remove people in bulk

1. On the People page, select multiple rows.
2. Click the **Actions** button and choose **Remove from Directory**.

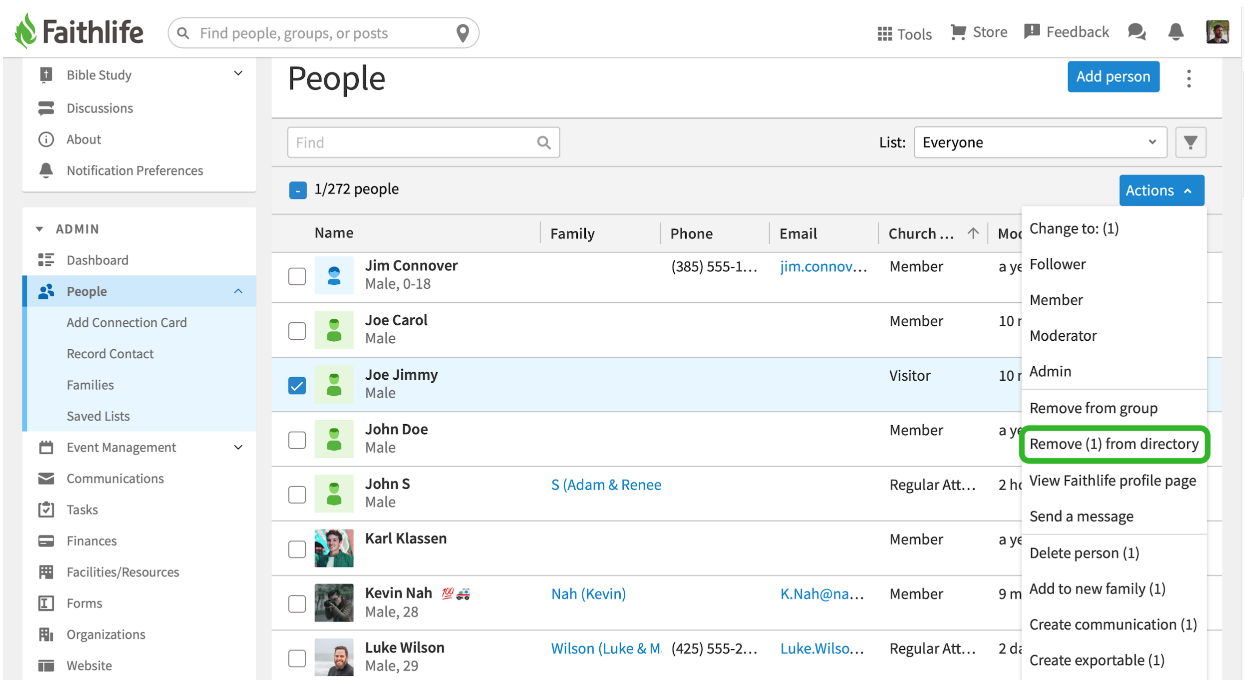


Hide People or Details from the Member-Facing Directory

Once you set someone's church status as *Member* or *Regular Attender*, they will show in your Directory. You can still, however, hide people or details from the member-facing directory.

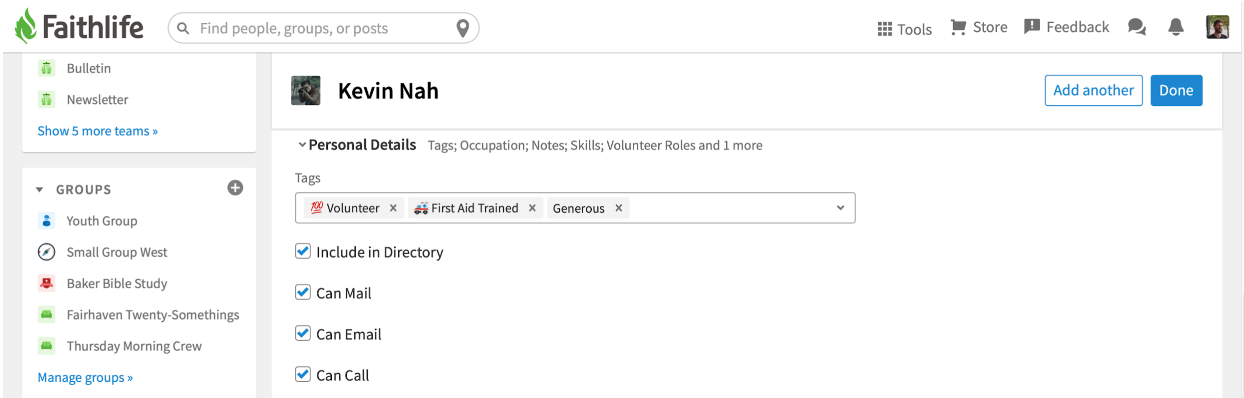
Hide people from the member-facing Directory

While viewing the Directory, select a record(s), expand the **Actions** menu, and choose **Remove from Directory**.



Note: The person will still show when viewing the Directory as an Admin or Moderator. To ensure the person is hidden from the member-facing Directory, switch the **View as** toggle above the Directory to **Member**.

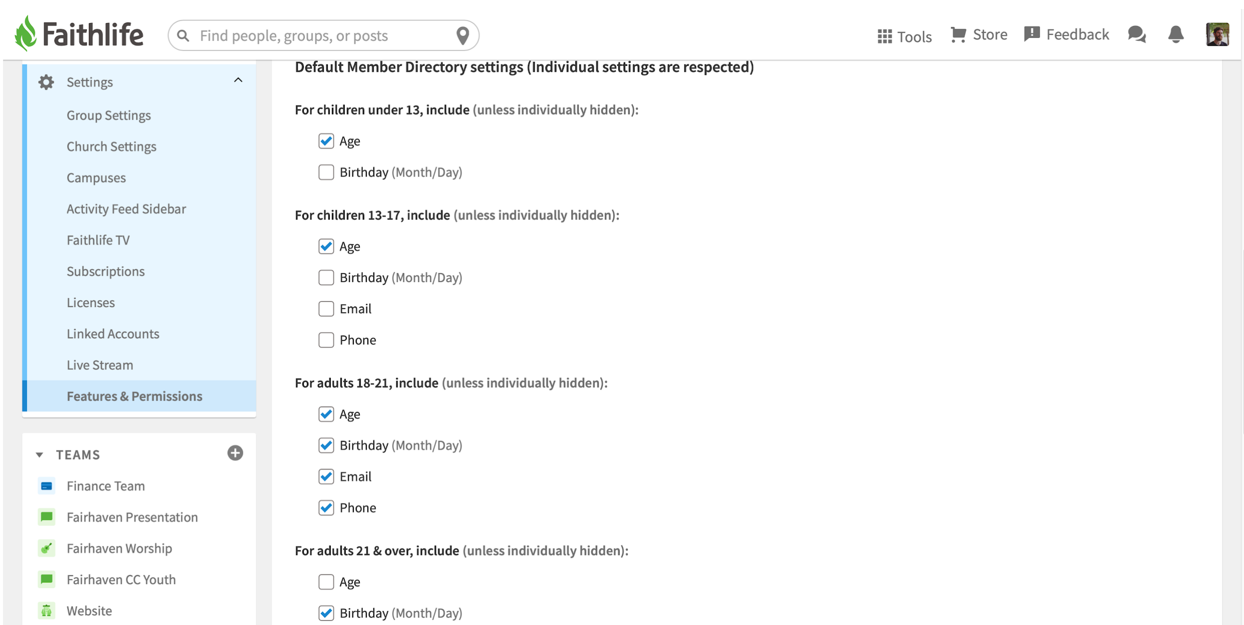
You can also hide someone from the individual's person record. Click **People** in the left-hand **Admin** panel, open a record, expand the **Personal Details** section, and uncheck **Include in Directory**. This acts as a master-toggle for the person's record. Changes save automatically.



Hide details from the member-facing Directory

You can also adjust specific pieces of information to show/hide in the Directory. When you add people to your Directory, Faithlife uses your default Directory settings to decide what information to display. To adjust these defaults:

1. Expand **Settings** in the **Admin** sidebar panel and click **Features and Permissions**.
2. Scroll down to the **Directory** section and check/uncheck information to change your defaults. Learn more about group privacy settings.



While viewing any person record, you can hide or show details in the Directory by clicking the **Directory** icons. Choose between:

- **In Directory**
- **Not in Directory**

Note: Remember, if the main hide/show switch (shown in step 1 above) is *unchecked*, that person's information will not appear in the member-facing Directory. Once the main hide/show switch is checked, however, all details toggled to **In Directory** will display.

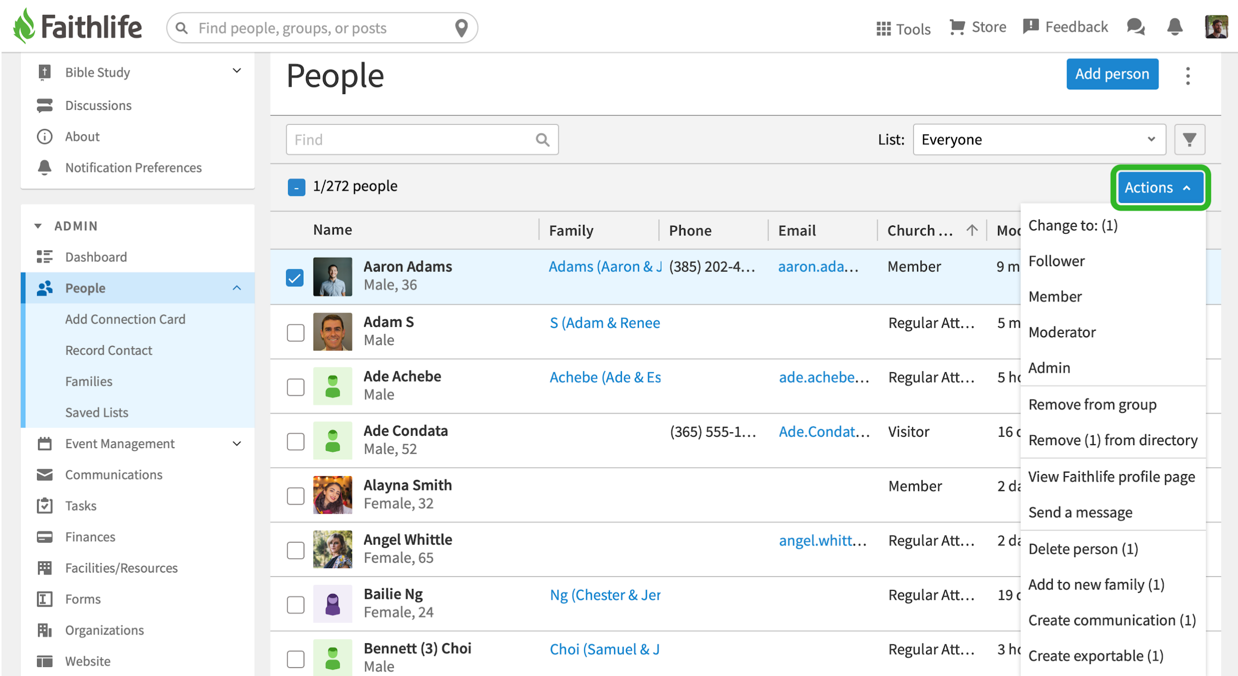
Update Directory Information

Admins or **Moderators** of your group can update Directory information on two levels.

Update information from the Directory

You can adjust basic information from the Directory by selecting a record(s) and expanding the **Actions** button.

Depending on your selection, a variety of options will display. Where applicable, the number in parenthesis indicates how many selected records fit the Actions menu option. You may be redirected to the **People** tab after selecting an option.



- **Change to:** If the person has connected with your group on faithlife.com, you can change their role within your group.
- **Remove from group:** Remove the selected individual(s) from your group.
- **Remove from Directory** or **Add to Directory**: Removing someone from your Directory hides them from the member-facing side of your Directory.
- **Delete records:** Permanently remove the person from your directory, delete your admin person record, and (if applicable), remove them from your group. If you only want to hide them from your member-facing directory, use the **Remove from Directory** option shown above.
- **View Faithlife profile page:** If the person has a free Faithlife account, you can view their profile page.
- **Send a message:** Send a Faithlife message to someone in your group.
- **Add to new family:** Assign the selected record(s) to a family record.
- **Print directory**: Print a directory for the selected record(s).
- **Print address labels**: Print address labels for the selected record(s).
- **Create exportable:** Open an exportable for the selected record(s).
- **Invite to Faithlife group:** If the person is not a member of your Faithlife group, you can invite them. The best way to bulk-invite records to your group is to filter by **Not in Group** using the **Show** filter menu, select all records, and use this menu option.
- **Merge records:** Select any two records to review and merge them.
- **Create communication:** Open a preselected communication.

Update specific information from people records

Update specific details about a person and what displays in the directory from people records. Changes are saved automatically. As is mentioned above, information available to show in the Directory includes a **Directory** icon. Clicking the icon will toggle between **In Directory** and **Not in Directory**.

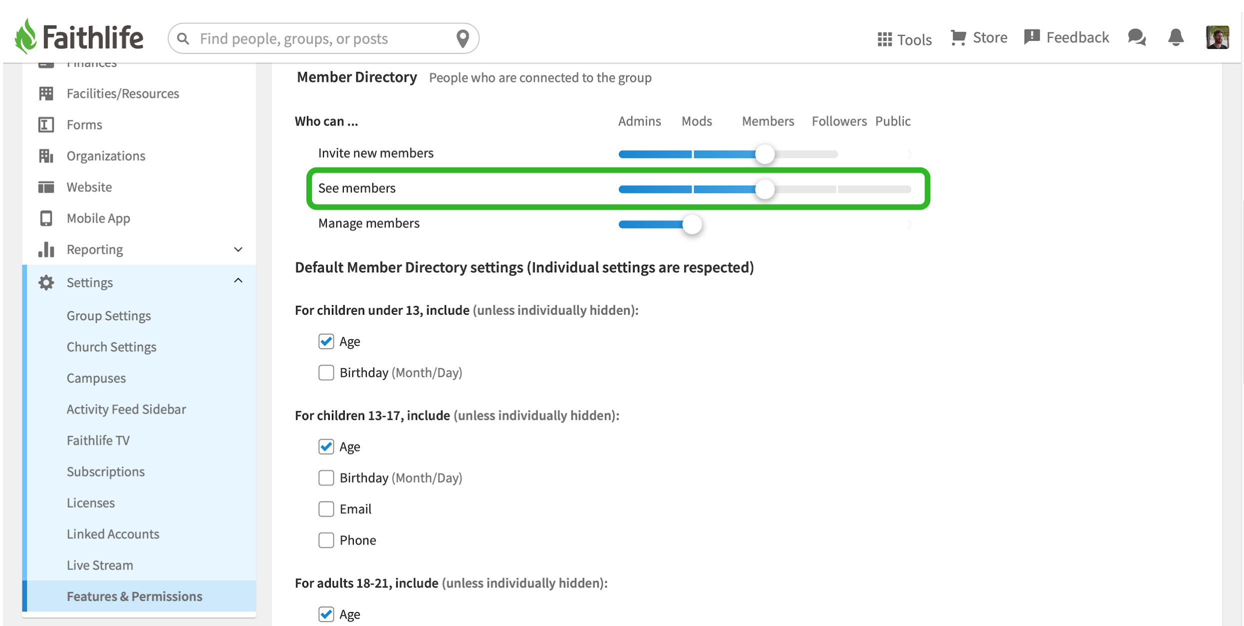
Note: You can find the master toggle for show/hide in the Directory in the **Personal Details** section of each person's record.

Control Who Can View Your Directory

You can decide what Faithlife group roles can view your Directory from your group's settings. To hide/show your entire Directory from groups of people:

1. Expand **Settings** in the **Admin** sidebar panel and click **Features and Permissions**.
2. Scroll down to **Member Directory** and drag the **See members slider** to set your Directory's visibility. [Learn more]() about group privacy settings.

   Note: Only **Admins** or **Moderators** can adjust group privacy levels.



Need More Assistance?

Additional Resources

Find more training and documentation at support.faithlife.com

Sign up for webinars & live training at faithlife.com/church-tech-webinars

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Contact Us Anytime

We’re open 365 days a year (including holidays).

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