

Standard Operating Procedure: Adding Contacts to MP

Procedure:

1. Gather all info possible from visitor.
2. If visitor is attending on Sunday morning, information goes to Suzanne. If visitor is attending at another event during the week, information will be added by specific ministry area. **If you wish this visitor to be added to a SS group, give info to Suzanne, do not add them to that group yourself.**

Sunday Morning:

1. Follow normal procedures regarding getting guest forms to the Data Specialist for input into Ministry Platform. All guest forms should be turned in to her by noon on Mondays.

Wednesday Evenings and Other Events:

1. Ministry area is responsible for inputting information. If there are children participating across multiple ministry areas, those assistants are responsible for communicating whom will do the input for the whole family.
2. Be sure the contact does not already exist in our system by checking under the "All Records" view on the Contacts page. Check name, email, phone, mailing address, etc. to confirm.
3. Use the Add/Edit Family Tool under "Tools" at the top of the Contacts Page to add a new contact.
4. Fill in all the information you have on every family member.
5. Refer to glossary for Participant Type designations and assign each family member accordingly.