



## Services Training Manual

1. Services icon
2. Click on the 'Add Service' button to add a Service or Event to the calendar
3. Type in a Name and choose your Start and End dates and times
4. Select if it is an all-day event, or a repeating service, by checking the appropriate checkbox below
5. If you select 'Event Repeats' you will select how often it repeats, the day it occurs, and an ending preference
6. Select who can check into this Service or Event via the dropdown menu
7. Select the appropriate checkboxes to print out a Nametag and Parent Copy automatically
8. The 'Show More Options' link allows you to add a Description or insert a link
9. When you are finished creating the Service or Event, click on the 'Save' button
10. To check people into a Service, click on a Service or Event from the calendar and click on the 'Check in' button
11. From the Check-in page, click on the 'Check In Members' button
12. Check names that you wish to check in and close the box when you are finished
13. The names will populate on the page with the date & time they were checked in
14. Quickly add a first time Visitor by entering first & last name, 'Add Member' button
  - a. Select which ministry category the Visitor falls under, if applicable
15. If your settings are set to print off a child nametag, it will do so automatically
16. Click on the 'Parent Copy' button next to the child's name to print off a parent copy
17. There are options in the left column to view different areas attached to a Service
18. Overview will allow you to view how many members attended
19. Click on the 'View Attendees' button to see who attended and who did not
20. Click on the 'Show Not Checked In' link to see those who did not attend
21. You will also have the option to email, text, or export, those who attended or did not attend
22. Reports allow you to view individual and total attendance between specific dates and download into an excel spreadsheet
23. Settings allow you to change the original settings you set when creating the Event or Service
24. Click on the 'Save Changes' button if you change anything
25. Delete via the 'Delete Service' link, followed by the 'Confirm' button
26. Qualified Members allows you to view the list of qualified members for that Service or Event and email, text or export

27. To go back to the calendar, click on Services in the header bar