

Using iKnow for your Electoral Roll - Script

The Electoral Roll is a vital part of managing your Church. Having access to your Church contacts, and being able to adjust these details are essential.

Using iKnow Church, there are two ways which you can create, track and update your Electoral Roll. We'll take a look at both of these methods, and as we progress along, I'll give you time to recreate these on your own account too.

In order to use these tools, you will need to have upgraded to the full iKnow Church package as they are not available on the Life Events Diary.

1) Member Type:

Perhaps one of the most simple ways which you can dictate a member is on your Electoral Roll is by using the 'Member Type' Drop down.

Initially, lets take a look at this drop down, and then I'll show you how we can update the options in here.

Firstly, we want to head into 'People' off of the Dashboard. This is the main database for the Church, where you'll be able to access the details for everyone you have on your records. Once you're in the database, we want to view a person's profile. If you don't have a 'test' profile on your database, you may want to simply search for yourself for now. Once we have a person's profile in front of us, we want to 'Edit' the profile.

On the Right hand column of details, we have a trio of drop downs, which can all be used to designate what kind of contact this person is. The 'Contact Type' is probably the most important of these 3 as it is this which is used to dictate whether a contact is one which would count towards your charged quota (iKnow is priced according to the amount of 'Church Members' you have. If a Contact is set to 'Church' in the Contact Type drop down, they will be included in that count). For someone on your Electoral Roll, you will most likely be setting this to 'Church' as they will most likely be a regular congregant for your Church. However, if they are not, you may wish to use 'Missional' for their Contact Type.

Below the Contact Type, you have the 'Attendance Type'. Here you can choose what sort of attendance the contact has within the Church. Are they a regular attender, do they only attend Season festival services such as Christmas and Easter or perhaps you may wish to record that they attend your Morning Services or Evening services (I'll show you how you can add these options shortly).

Finally we come to the 'Member Type Drop Down. Here you can choose from several options. Again, if it's not already there on your account, I'll show you how to add options to this drop down. Once you've selected your options from the drop downs, remember to click on 'Save' at the bottom of the profile.

In order to add options to either the Attendance or Member Type Drop downs, from the Dashboard, click on 'Settings'. Next we want to head into 'Dictionary'. This should be the first option on the top row.

As a side note, in the Dictionary here, you're able to customise the vocabulary used within your iKnow Church account in order to match your Church. Simply change the word in the text box on the right which correlates to the word you want to change.

To change the drop down options, Click on the 'Drop Downs' tab. Next, select from the drop down menu, which Drop down you would like to alter.

Once you've added the option to the drop down option, you can begin to record members on your Electoral Roll simply by changing their 'Member Type' on their profile. When you've added everyone to your Roll, you'll want to see these all as a list. To do this, we need to create a Search using the 'Finder' Module.

From the Dashboard, click on the Finder Module (Magnifying Glass icon).

All we need to do is select the 'User Profile' > 'Member Type' > 'On Electoral Roll' options and then save our query. To see our results, we return to the People module, and find our search on the left hand side. When we click on the search name, iKnow will automatically run a live search on the database for everyone who matches that criteria. To download these names and contact details, simply click on 'Communicate with this group' and then select CSV.

2) Custom Fields

The second way to build your Electoral Roll using iKnow, is perhaps a little more technical, but gives you more flexibility to maintain multiple lists. The second method is using Custom Fields.

To create a Custom Field, from the dashboard we want to head into Settings. Once here, we select Custom Fields. Custom Data is recorded in Sections and Fields. The easiest way to think of this is that the Sections are our subjects or topics, and then the fields are the questions we're asking.

To demonstrate this, I'm going to create a Custom field with the Section 'Electoral Roll'. Once I've set this up, I'm going to add the 'question' (or field) 'Which Electoral Roll are you on?' with the 'Answer Type' of Check Box. I can now provide multiple potential answers which we can tick. For Example, 2019, 2020, 2021, 2022.

Once I've saved this, I can go to an individual's profile in the People Module where I should now see the section I've created. If I edit this person's profile, I can now tick the relevant boxes.

Again, to see the results we need to create a search in the Finder. This time we want to select 'User Profile' > 'Custom Field' > 'Electoral Roll' (Or the Section Heading) > and then the option you want to search for.

You can of course, add multiple layers to your search if needed. Let's say for example you wanted to search for members who were on both the 2020 Roll and the 2021 Roll.

If you over see multiple Churches, you can create these searches for each Church too, all within the same iKnow Account.