Willowdale
connect

# Leaders Edition

Willowdale
CHAPEL

Greetings Willowdale Small Group Leaders!

Getting Started

As a small group leader, you will be encouraging your members to login to Willowdale Connect and update their profile to share personal information with "Friends & My Group Members"
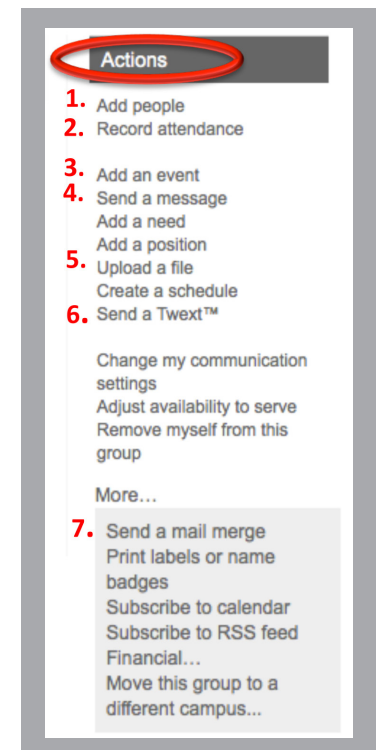
The "Willowdale Connect" launch pamphlet has step-by-step instructions for signing up, requesting a Login, and updating profiles.
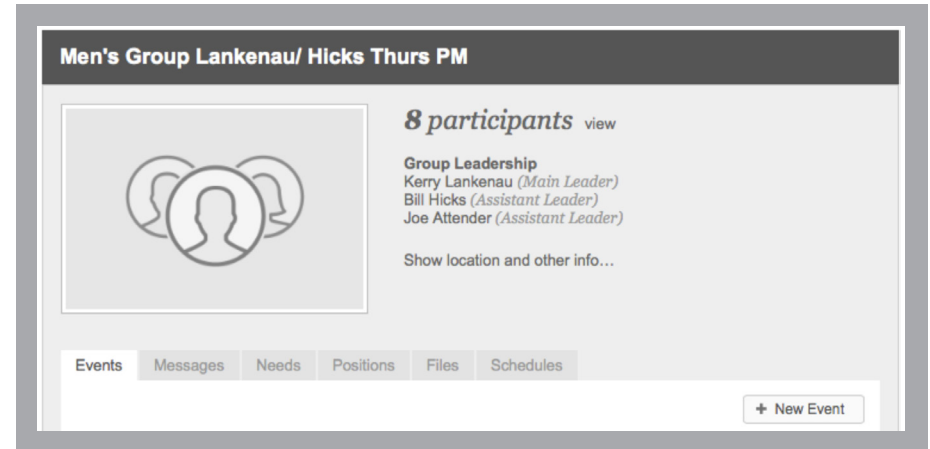
As a small group leader, you can:

- Manage the members in your group (1)
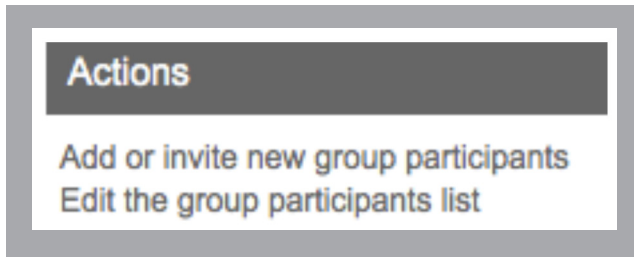- Manage group's attendance (2,3)
- Communicate with your group (4,5,6,7)

Select your group member by clicking on:

8 participants view

A grey action box on the right hand side will allow you to add and/or edit your participants.

Actions

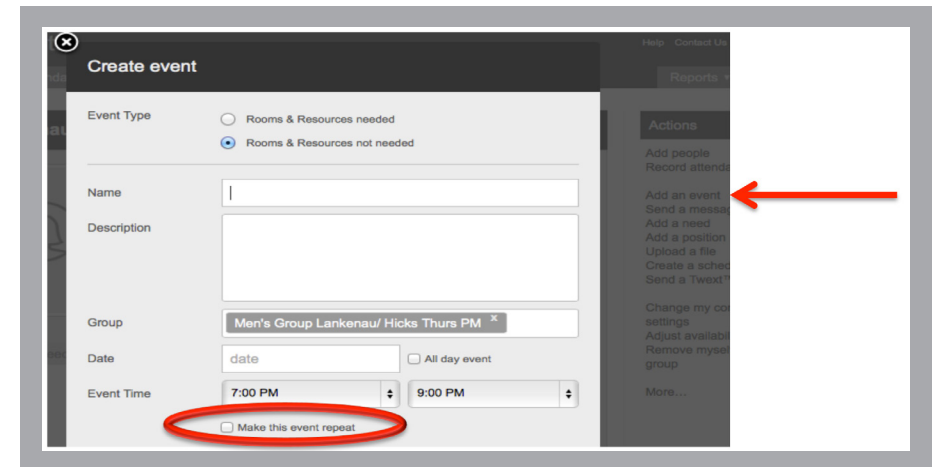Add or invite new group participants
Edit the group participants list

❑ Choose "People by Name" to add people directly into your group.

❑ Use "Edit the group participant list" to remove people from the group.

Using Willowdale Connect to manage your group keeps your group communication in a central repository for future reference and frees you from keeping your own (and typically quickly outdated) distribution lists.
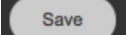
You can manage your group's attendance by creating an event and documenting attendance using the event.

Begin with creating an event. Create an event using the "Add an event" button from the Actions menu. Check "Rooms & Resources not needed" radio button.
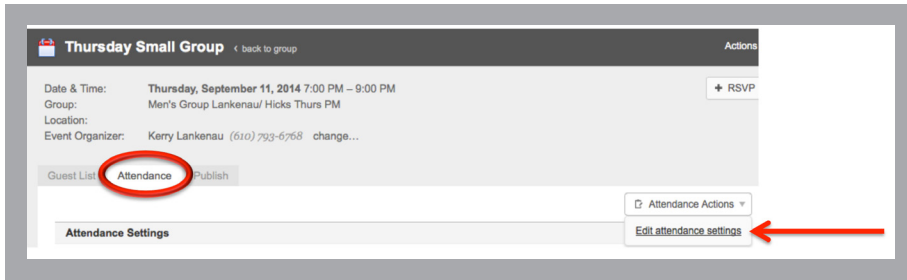
Create event

| Event Type | ○ Rooms & Resources needed |
| | ⦿ Rooms & Resources not needed |

Name

Description

Group: Men's Group Lankenau/ Hicks Thurs PM

Date: date   ☐ All day event

Event Time: 7:00 PM   9:00 PM

☐ Make this event repeat

Actions
Add people
Record attend...
Add an event
Send a messa...
Add a need
Add a position
Upload a file
Create a sche...
Send a Tweet!
Change my co...
settings
Adjust availab...
Remove myse...
group
More...

❑ Fill in the Name of your event, date, and time.

❑ Utilize the "Make this event repeat" to create a series of events.
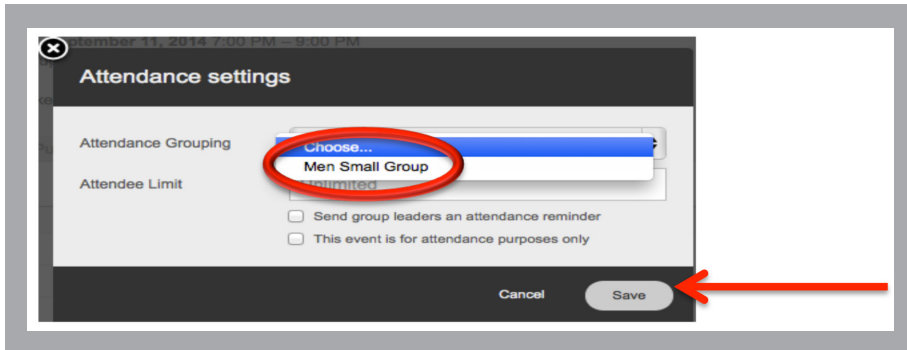
No other information is required.

Be certain to **Save** your event.

After you have saved your event, select the Attendance tab.

Now that you have an event with an attendance group, you can take attendance. (Note: You cannot take attendance before the event has begun.)

Select "Record attendance" to begin taking attendance.

❑ Click the "Attendance Actions" button and "Edit attendance settings".

A pop-up box will appear.
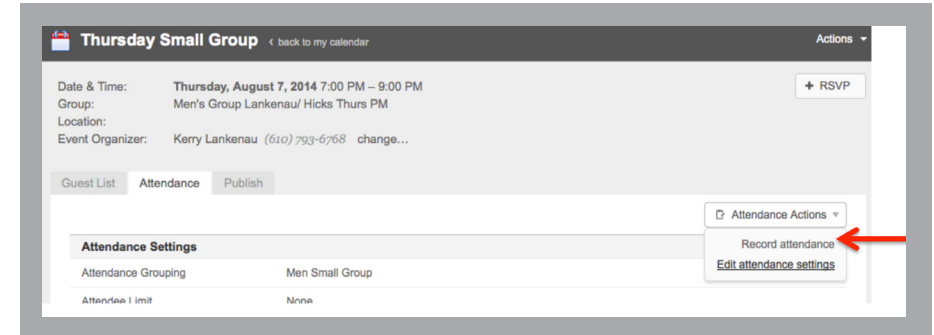
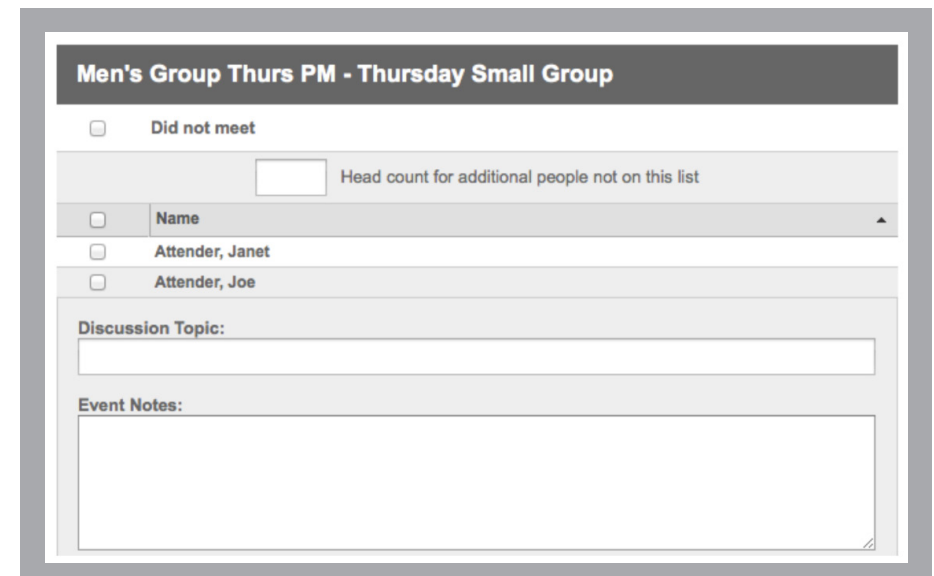Besides recording attendance, you can take notes about the meeting.

You can edit the event updating the attendance and/or notes as required.

❑ Select the attendance group and hit the Save button.

Your event Is ready to take attendance.

You can communicate with your small group sending internal messages using the "Send a message" button from the Actions menu.

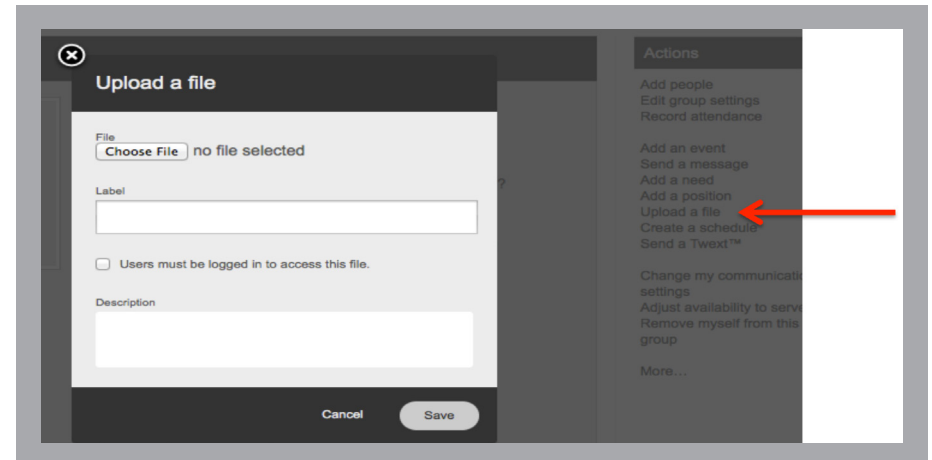A very basic email template pops up for inputting a message.
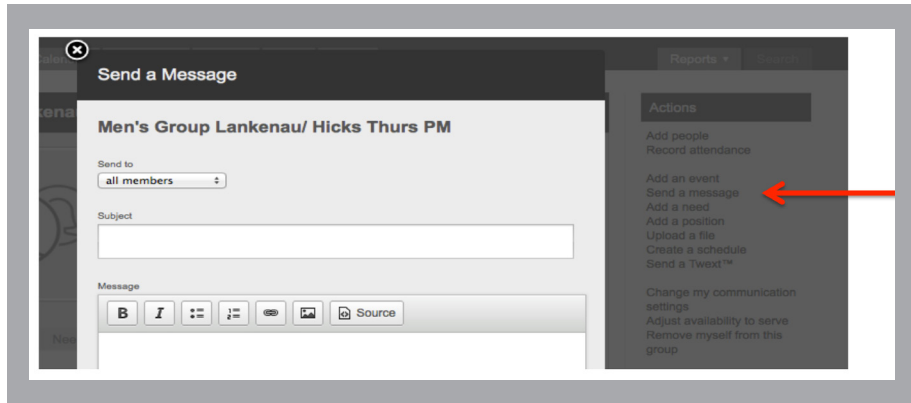
All messages sent using this feature are managed and accessible to the group via the "Messages" tab.
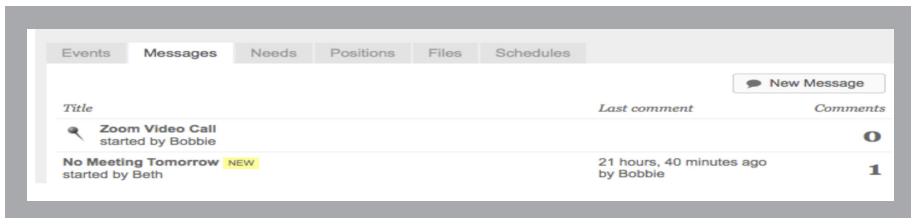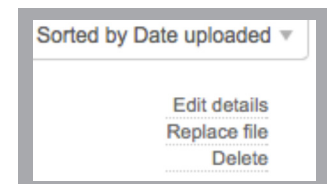

You can share files with your small group using the "Upload a file" button from the Actions menu. A very basic template pops up allowing you to select, name and provide a description of the file.

All files uploaded using this feature are managed and accessible to the group via the "File" tab.
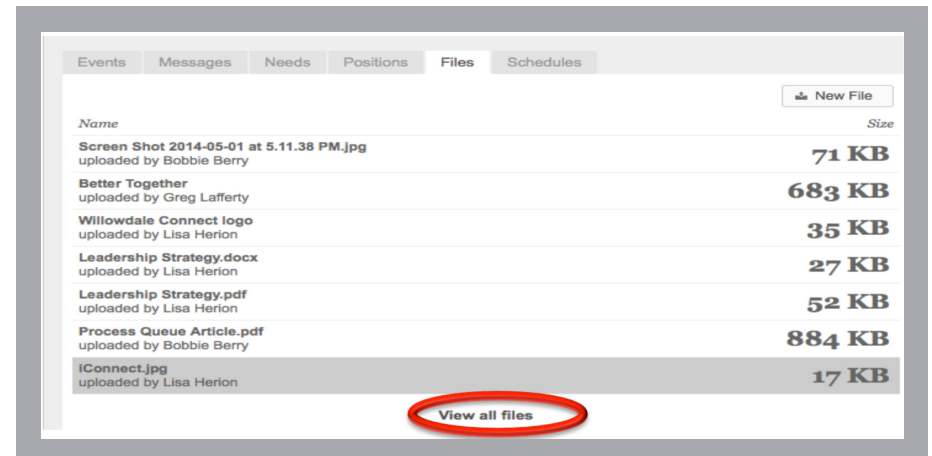
The "View all files" button allows for further management of a file.

Communicate With Your Group: Sending A Twext

You can text or tweet with your small group internal using the "Send a Twext™" button from the Actions menu.

A very basic template pops up for inputting a message.

This is a great way to remind group about the next small group meeting.

❏ For Texting to work, your small group member has to have a mobile number and "Mobile Carrier" defined. *(See Section 9 in the "Willowdale Connect" Pamphlet)*.

❏ For Tweeting to work, your small group member has to have a Twitter account defined. *(See Section 9 in the "Willowdale Connect" Pamphlet)*.

❏ As the small group leader, you don't need to know which is their preference.

Communicate With Your Group: Sending A Mail Merge

You can send a 'traditional' email to your small group.

Click on the more button from the Actions menu to locate the "Send a mail merge" option. Click on the "Send a mail merge".
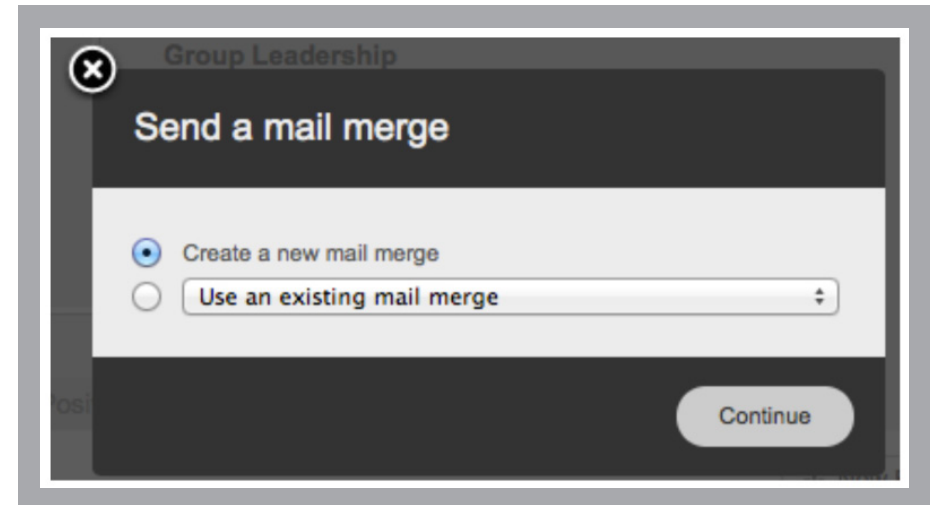
You will be given the option to use an existing mail merge or create a new one.

Initially, you select "Create a new mail merge" and hit the Continue button.

❏ A very basic email template will pop-up.

❏ Compose the email (Step 1).

❏ Choose Recipients (Step 2) which will automatically select your small group and then Send (Step 3).

For Mail merge to work, your small group member has to have a email account defined. *(See Section 9 in the "Willowdale Connect" Pamphlet.)*

Willowdale
CHAPEL