

The logo for FellowshipOne, featuring the word "FellowshipOne" in a blue, italicized serif font. The "F" is significantly larger than the other letters. A small "TM" trademark symbol is located at the end of the word.

*FellowshipOne*TM

FellowshipOne Mobile App Product Guide

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Overview

FellowshipOne Mobile puts the power of **FellowshipOne** in the palm of your hand.

Developed to replace F1 Touch, **FellowshipOne Mobile** includes a modern user interface, Advanced People Search feature, and an enhanced individual profile view including both Groups and Notes. Best of all, **FellowshipOne Mobile** now gives Premier churches access to Tasks, enabling them to manage Contacts on the go. Caring for your congregation has never been so easy!

Feature/Function

FellowshipOne Mobile is available for all editions. However, some functionality is designed specifically for Premier Editions. For more information on Premier, please contact your Customer Success Manager at csm@fellowshipone.com

Features	Function	FellowshipOne Premier	All other FellowshipOne Editions
Advanced People Search	Search for individuals by name	✓	✓
	Search by any combination of name, phone number, email address, and date of birth	✓	✓
	Include individuals with inactive or deceased statuses in searches	✓	✓
	View recent searches	✓	✓
Enhanced Individual and Household profiles	Name, status, DOB, household position and marital status	✓	✓
	Address	✓	✓
	Communication values	✓	✓
	Individual Group involvement	✓	✓
	Individual Notes	✓	✓
	Add new Individual Notes	✓	✓
	Household members	✓	✓
Easy communication with congregants	Name, status, DOB, household position and marital status	✓	✓
	One touch text, phone and email communication	✓	✓

Features	Function	FellowshipOne Premier	All other FellowshipOne Editions
	View addresses on a map	✓	✓
Task/Contact Management	Easily see number of new tasks needing follow up	✓	
	View your task counts by Ministry	✓	
	Track tasks that are not assigned to you	✓	
	Mass Close and Transfer multiple tasks at once	✓	
	Work household and individual tasks	✓	
	Add Contacts to tasks	✓	
	Share notes with other contact items	✓	
	Add and Edit dispositions	✓	
	Close Tasks	✓	

Setup

Portal Settings

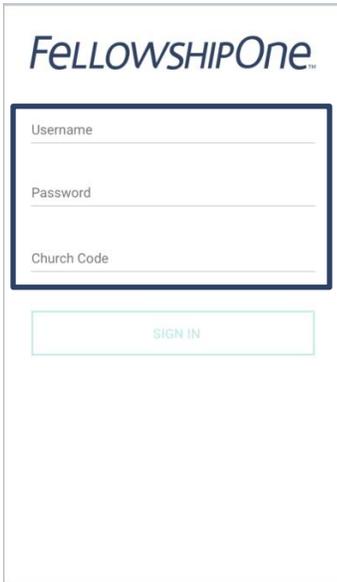
All churches must enable the FellowshipOne Mobile Application from within the FellowshipOne Portal

1. Go to *Admin > Integration > Applications > 1st Party Applications*
2. Click on **FellowshipOne Mobile**
3. Click **Grant Access**

Supported Mobile Devices

FellowshipOne Mobile is optimized for viewing on mobile phones; Apple iPhone (iOS 10.3 or later versions) and Android phones (Android 4.4 or later versions). The FellowshipOne Mobile App is available for download in the App Store (Apple) and the Google Play Store (Android).

Sign In



Sign In with your FellowshipOne login credentials:

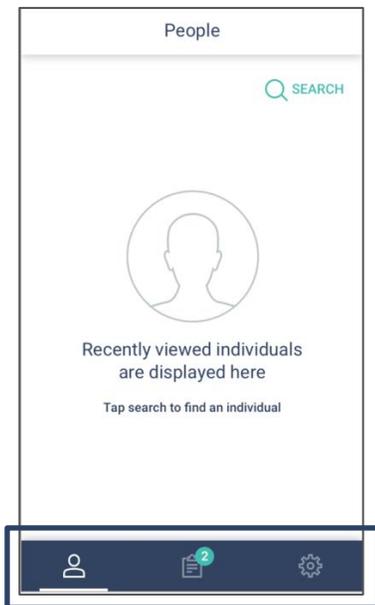
Username

Password

Church Code

If you don't have your login credentials, please contact your church's FellowshipOne Administrator.

Navigation



The Toolbar at the bottom of the screen is used to navigate between three (3) areas of the FellowshipOne Mobile:



People

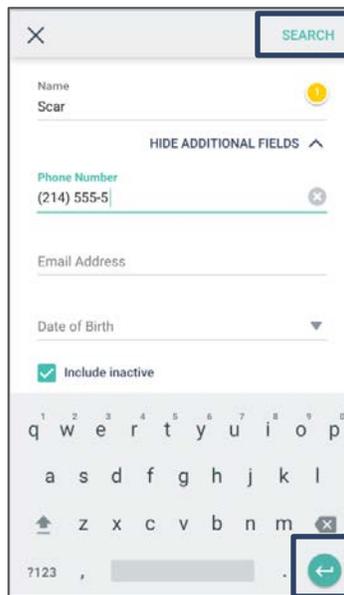
The People Tab is used to access information regarding the Household and/or Individual. To access People, click on the People icon on the taskbar. You can search for individuals, view the search results and view any recent searches.

Search

Like the FellowshipOne portal, there are multiple ways to search for household/individual records given the information available to you.

To search for an individual by Name:

1. Tap the **Search Icon**
2. Enter one (1) or more letters of the first or last name or any combination there of
3. Tap **Search** or the **Search icon** on the keyboard

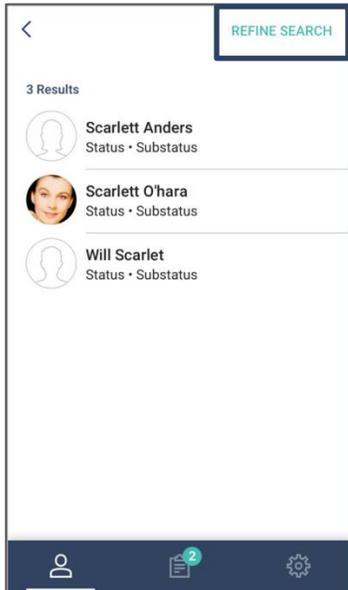


To Search by Additional Fields:

1. Tap **Down Carrot** next to Show Additional Fields
2. Information can be entered in one or more of the following fields:
 - a. Name- (allows partial info to be used for search)
 - b. Phone Number- (allows partial info to be used for search)
 - c. Email- (allows partial info to be used for search)
 - d. Date of Birth- (Requires full DOB)
3. If information is entered in multiple fields, only records that match ALL criteria are returned
4. Check *"Include Inactive"* to return records where the individual has a status from the Inactive Status Group
5. Check *"Include Deceased"* to return records where the individual has a status from the Deceased Status Group
6. If information is entered in multiple fields, then the Search Results are limited to records matching ALL criteria

Search Results

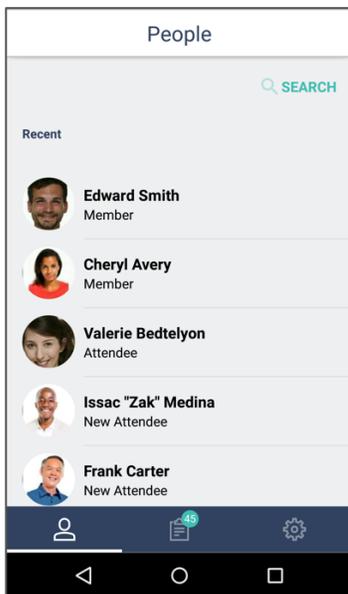
Upon completing your search, the search results are listed in the following screen.



- ❖ *Search Results* are displayed in alphabetical order by first name
- ❖ Tap **Refine Search** to update or add search criteria
- ❖ Tap the desired record to view the individual profile

View Recent

After viewing records, the People tab will default to the most recent individual profiles viewed through the FellowshipOne Mobile App.



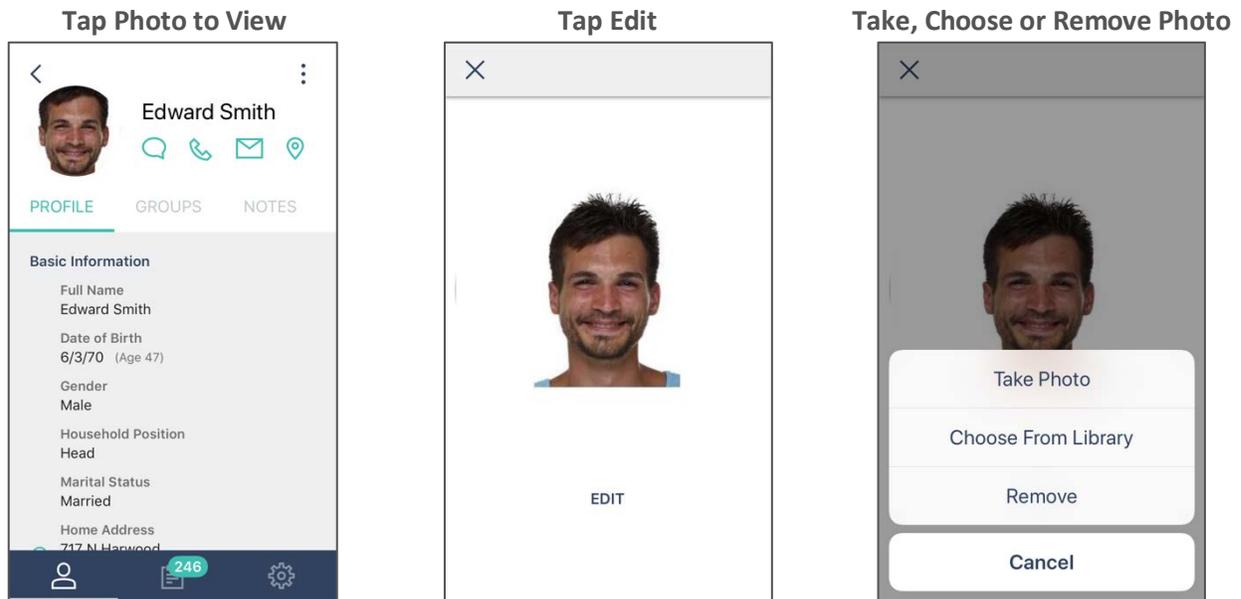
- ❖ The last 10 individual profiles viewed are listed under “Recent”
- ❖ The most recently viewed person is at the top
- ❖ Individuals are only listed once even if viewed multiple times

View Individual Profile

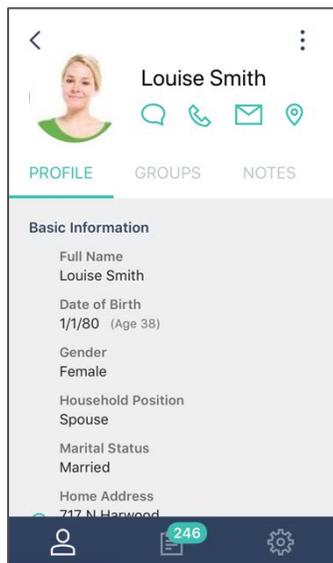
The Individual Profile Header contains the **photo or avatar** for an individual, **Communication Icons** for one-touch communication and a **3-dot menu** that allows portal users to either “**View Household**” or “**Add to Phone Contacts.**”

View, Add, or Edit Photo

To Add, Edit, or Remove a photo, portal users must have the Edit People access right.



The Individual Profile Header contains **Communication Icons** for one-touch communication.



Tap to open texting on your phone.

Individuals mobile number is auto-entered in “To” field

Tap to initiate phone call to preferred phone number



Tap to open Compose Email on your phone.

Individual’s preferred email is auto-entered



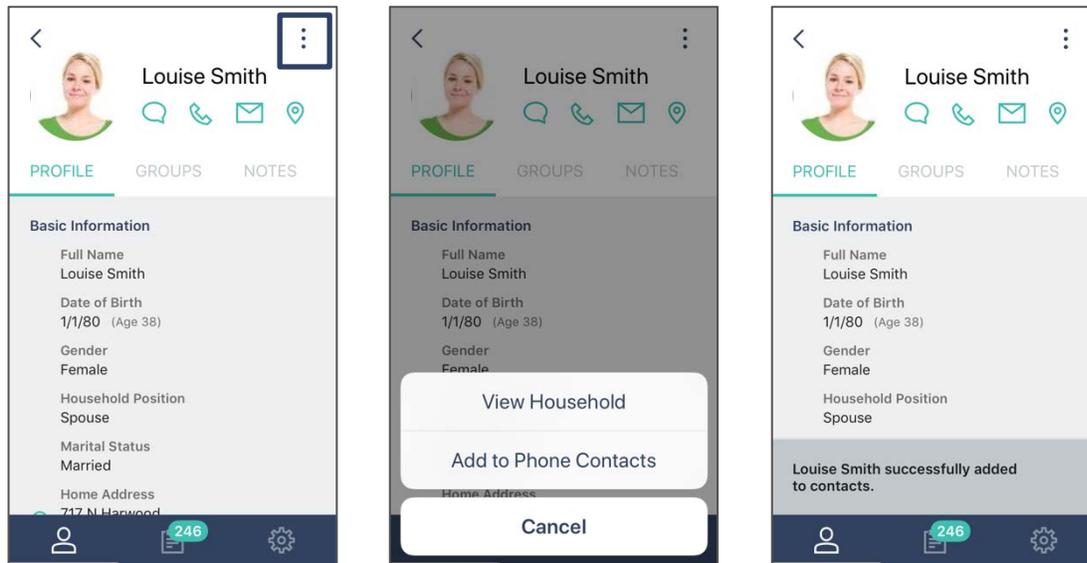
Tap to view Address on Map. This will use the default map application enabled on your phone (i.e. Google Maps)

NOTE: Communication icons are grey and disabled if individual is missing necessary communication values.

Add to Phone Contacts

To quickly add an individual to the Contacts on your iPhone or Android:

- Tap the 3-dot menu
- Tap **Add to Phone Contacts**
- Tap Cancel to return to the individual profile



Profile

Under Profile, the Individual’s pertinent information is displayed from their name and address to their social media usernames (if added in FellowshipOne).

Basic Information	Communication Values	Status Information	Social Media
Full Name Date of Birth Gender Household Position Marital Status Home Address (Includes Map Pin for viewing address on map)	Home Phone Cell Phone InFellowship Email Primary Email <i>(Preferred designates values marked as preferred in the FellowshipOne Portal)</i>	Status Sub Status Status Date	Facebook Instagram Twitter

NOTE: The Communication Values Tab Includes one-touch communication icons where applicable.

Groups

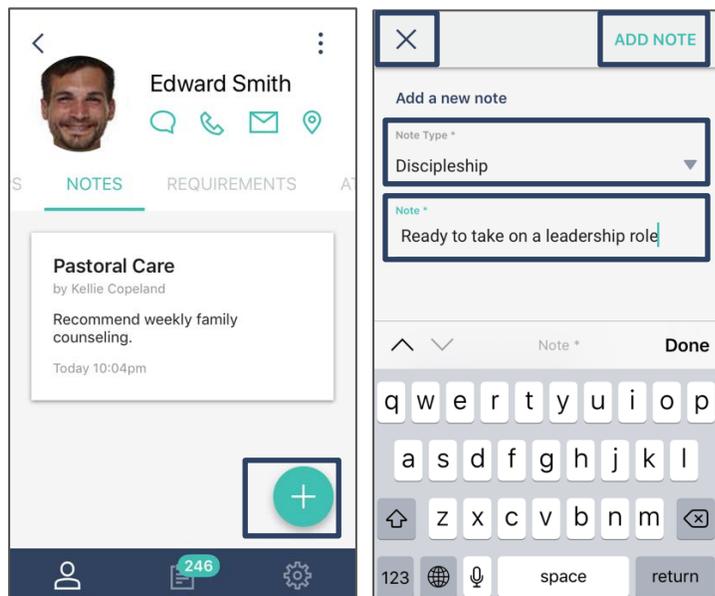
As with the FellowshipOne portal's individual record, you can view a person's involvement in groups by clicking on the Groups Tab.

Ways to Sort Groups	Group Information
Groups the individual leads, ordered by the most recent joined date first	Group Name Joined Date
Groups the individual is a member of, ordered by the most recent joined date first	Last Attended Date

Notes

On the Note Tab, you can view all visible notes, grouped together by Note Type.

Security Access	Note Information
Visibility to Notes are driven by the same access rights that apply to viewing notes in the FellowshipOne Portal	Note Type Created/Updated By Text Created/Last Updated date and time

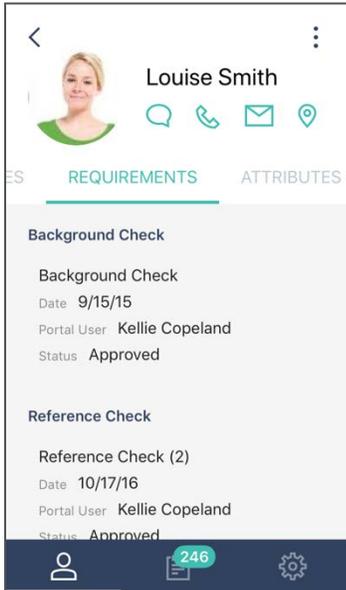


To add a new Note:

1. Tap **Plus icon**
2. Select Note Type
3. Enter Note Text
4. Tap **Add Note** to save
5. Tap **X** to exit without saving

Requirements

The Requirements Tab includes Requirements on the Individual Record, grouped by Requirement Type. Information displayed includes the Requirement Name, Date, Portal User and Status.



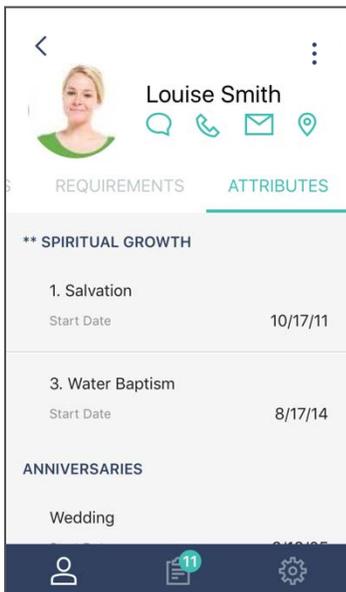
Security

Visibility to Background Check Type Requirements are driven by the same access rights that apply to viewing requirements in the FellowshipOne Portal:

- ❖ Portal users can only view the **status** of the Background Check if they have either the **View Background Check** or **View Background Status** access rights.
- ❖ Attachments associated with a requirement cannot be viewed from the FellowshipOne Mobile App.

Attributes

The Attributes Tab includes Attributes on the Individual Record, grouped by Attribute Group

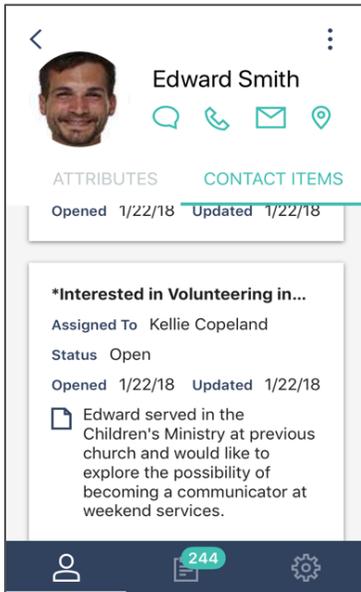


Information displayed in Attributes include the following (where applicable):

- ❖ Attribute Name
- ❖ Start date
- ❖ End date
- ❖ Pastor/Staff
- ❖ Comment

Contact Items

The Contact Items Tab includes individual Contact Items on the individual record with the most recently opened/updated shown first. Information displayed includes the Contact Item type, Assigned to, Status, and Opened and last Updated dates



Security

Visibility to Contact Notes are driven by the same access rights that apply to viewing Contact Notes in the FellowshipOne Portal:

- Portal users who have Contact Items routed to them from the same form, as well as users with access rights to the Ministry associated with the contact item type will see the initial note.
- Portal users with Ministry Read/write access rights to the Ministry associate with the contact item will also the Contact Notes
 - Select SHOW NOTES to show Contact Notes
 - Select HIDE NOTES to collapse Contact Notes
- Only portal users with the Confidential Contact access right may view Contact Notes marked as confidential
 - Confidential Contact Notes are notated with a padlock icon

Edit Individual Profile

Editing an individual is no longer confined to the portal but can also be accomplished through FellowshipOne Mobile. This ability to change a phone number or address is a highly valued feature.

Portal Access Rights

To ensure churches can control which users can Edit Individual Profile information in FellowshipOne Mobile, users must have the new **Mobile Profile Edit** Access Right AND the appropriate access right for editing each area.

Basic Information and Status and Social Media

- People Edit access right AND Mobile Profile Edit

Communication Information- Phone and Email

- Communication Edit AND Mobile Profile

Primary Address

- Address Edit (Primary) access right AND Mobile Profile Edit

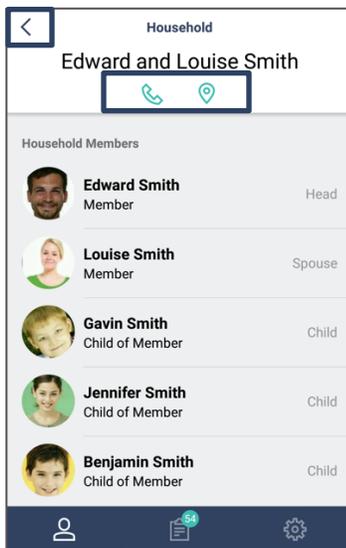
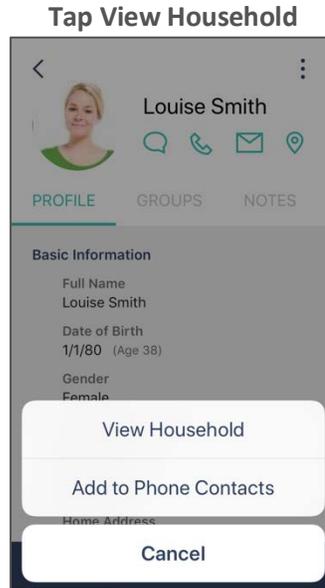
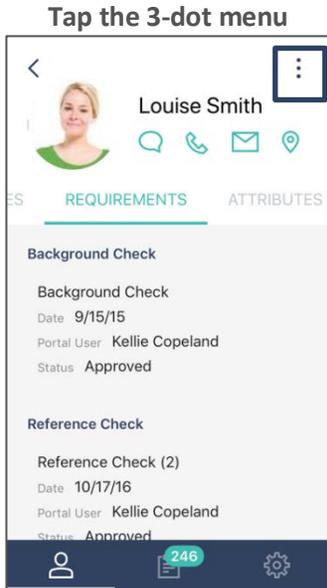
Edit Individual Profile

- Tap the Pencil icon (only available with Mobile Profile Edit access right)
- Tap in field to update field to update
- Make desired change
- Tap SAVE to keep the changes
- Tap X to cancel without saving changes

Note: Only areas for which an individual has the appropriate portal access rights are editable.

View Household Profile

To view the Household, tap **View Household** from any screen in the Individual Profile.



- ❖ **View Household** displays all household members in order of Household Position, and then by age.
- ❖ **Communication Icons** are displayed for Household Phone and Address.
- ❖ Tap any Individual to view their **Individual Profile**.
- ❖ Tap the **back arrow** to return to the previous page.

Tasks

The Tasks Tab in FellowshipOne Mobile correlates to Contacts in the FellowshipOne portal. Tasks are the action items assigned to a portal user for follow-up. In Tasks, you can:

- ❖ View Tasks that are Assigned to Me
- ❖ View Task Count by Ministry
- ❖ Manage Tasks
- ❖ Track Tasks not assigned to you
- ❖ Alert user to new tasks waiting to be viewed

To navigate to **Tasks**, tap the Tasks icon in the Toolbar.

NOTE: Only portal users with **People Contact** and **Ministry Read** or **Ministry Write** access rights will be able to view Tasks.

Assigned to Me

Assigned to Me Includes Tasks for which the user is the assigned “*Route to Person*”. The tasks displayed will have a status of **Open** or **In Progress**.

Tasks Count by Ministry

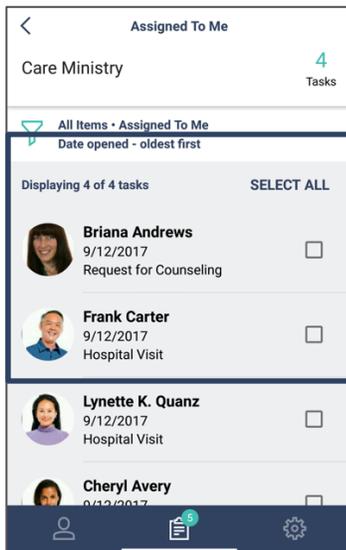


Task Count is the default page displayed when the Tasks icon in the Toolbar is tapped

This page displays a count of my **Open** and **In Progress** tasks, totaled by Ministry.

Tap desired Ministry to view **Task List**.

View Task List



The Task list displays all **Open** or **In Progress** Tasks associated with the selected Ministry.

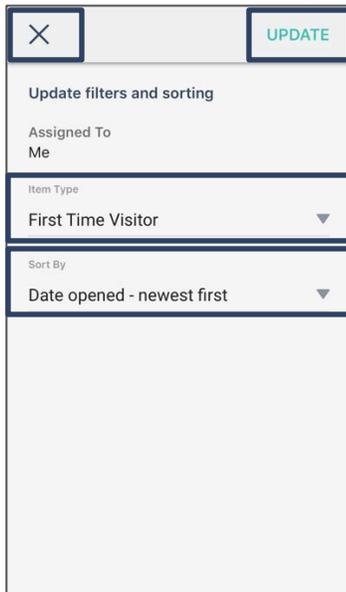
Information for each task displayed includes:

- ❖ Picture or avatar of individual or household
- ❖ Name of individual or household
- ❖ Date opened
- ❖ Date Updated
- ❖ Item Type

By default, all Item Types are displayed and sorted with the oldest task at the top.

To change what tasks are shown and the order they are shown in, tap the filter icon.

Update Filters and Sorting

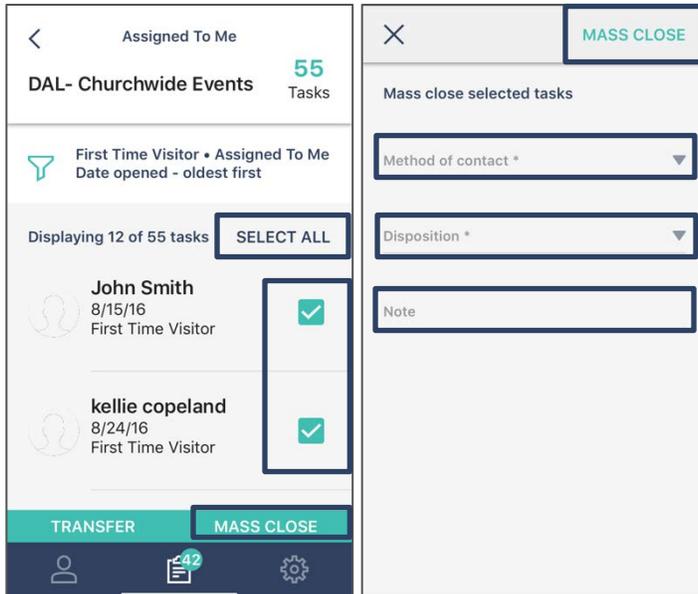


To update filters and sorting:

1. Select **Item Type** from the drop-down menu
2. Select **Sort By** from the drop-down menu
3. Select **UPDATE** to save filters
4. Tap **X** to return to Task List without saving

Mass Close

Closing multiple tasks at once is a lifesaver. Although this option is available, the Item Type must be enabled for Multiple Close in the FellowshipOne portal.

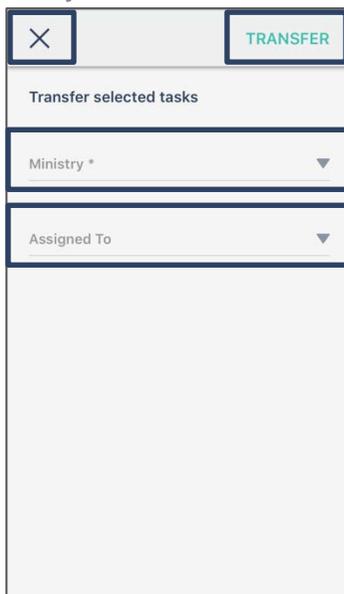


To Mass Close tasks:

1. Tap **Select All** or select **desired tasks**
2. Tap **MASS CLOSE**
3. Enter **Method of Contact**
4. Enter **Disposition** (if required)
5. Enter **Note**
6. Tap **MASS CLOSE** to close tasks
7. Tap **X** to return to previous page without closing tasks

NOTE: If a task is selected that is not enabled for multiple close, Mass Close is disabled.

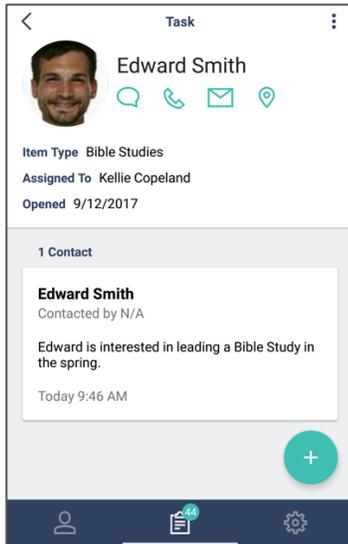
Transfer Tasks



To Transfer Tasks from the Task list

1. Tap **Select All** or select desired tasks
2. Tap **Transfer**
3. Select **Ministry** from the dropdown menu
4. Select **Assigned To**
5. Tap **TRANSFER**
6. Tap **X** to return to previous page without saving

View Task Details

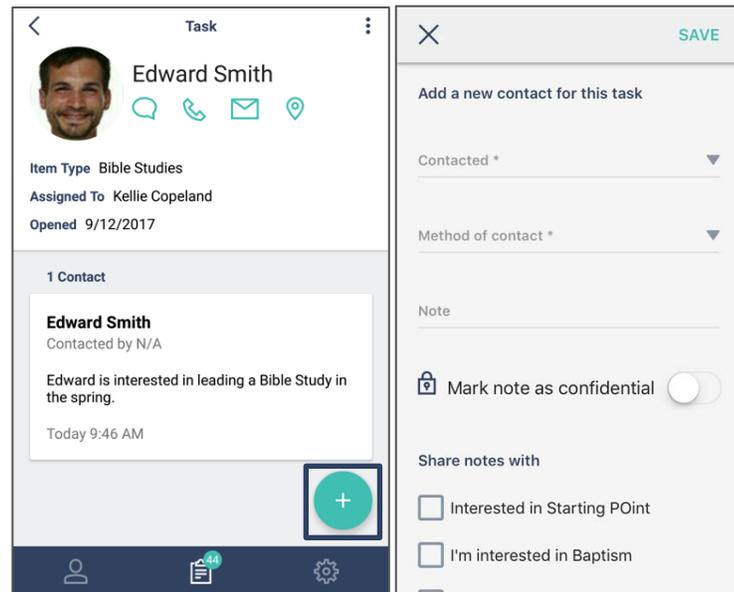


From the Task List page, tap the task to view **Task Details**.

Information displayed for each task includes:

- ❖ Name of Individual or Household
- ❖ Communication icons (for one-touch communication)
- ❖ Item Type
- ❖ Assigned to
- ❖ Date Opened/updated
- ❖ Initial Note
- ❖ Contacts

Add a new Contact



To add a Contact, tap the **Plus icon**

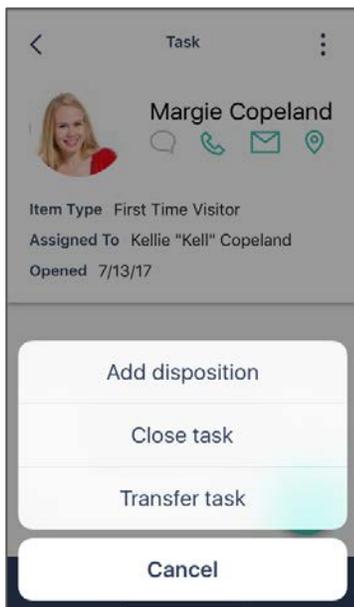
1. Select **Contacted** from dropdown menu
2. Select **Method of contact** from dropdown menu
3. Add **Note** if desired
4. Toggle on **Mark note as confidential** (if applicable)
5. Tap **SAVE** to add contact
6. Tap X to return to previous screen without saving contact

NOTE: Only portal users with the Confidential Contact Access Right can view confidential contact notes.

Consistent with Portal Functionality:

- **Share Notes With**- allows notes to be shared with other contact items that were entered on the same contact form as the current task
- **Transfer Task**- allows users to transfer the current task to a new Ministry and/or assign it to a different portal user
- **Disposition**- allows users to specify the outcome of a task. Disposition are set up in the Close Task (Some tasks require a disposition before they can be closed.)
- **Close Task**- Indicates that all necessary follow-up has been completed and changes the status of task to Closed

Task Details Menu



Use the three-dot menu, located in the upper right corner of the **Task Details** page, to make changes to the task, without adding a contact.

Users can:

- ❖ **Add/Edit disposition**
- ❖ **Close Task**
- ❖ **Transfer task**

Tap **Cancel** to close menu and return to **Task Details**

Open vs In Progress Tasks

As with tasks in the FellowshipOne Portal, the status of a task moves from **Open** to **In Progress** once it has been changed or updated in any way. If a task is viewed but not updated, it remains in the **Open** status.

New Tasks Badge



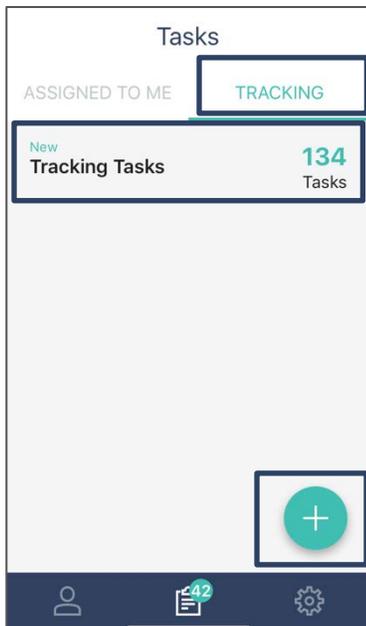
The **New Tasks Badge** on the **Tasks** icon in the Tool Bar indicates how many “new” tasks a user currently has.

Tasks are only classified as “New” if they have a status of **Open** AND if the **Task Details** have not been opened and viewed.

Tracking Tasks

FellowshipOne Mobile allows users to monitor and manage Tasks that are not assigned to them. Users can only track tasks associated with Ministries for which the user has Ministry Read or Ministry Write access rights. However, it will only show Tracked Tasks with a status of **Open** or **In Progress**

Task Count by Tracked Task



To View Tracked Tasks:

1. Tap **Tracking**
2. Displays a count of **Open** and **In Progress** tasks, totaled by Tracked Task Name
3. Tap name of Tracked Task to view **Task List**

Add a Tracked Task

To Add a Tracked Task

1. Tap **Plus icon**
2. Create a **Task Name**
3. Select a **Ministry** from dropdown menu
4. Select **Assigned to** from dropdown menu
 - a. Limited to users with rights to selected Ministry
5. Select **Item Type**
 - a. Limited to tasks assigned to selected user(s)
6. Select **Sort By** from dropdown menu

Edit Tracked Task

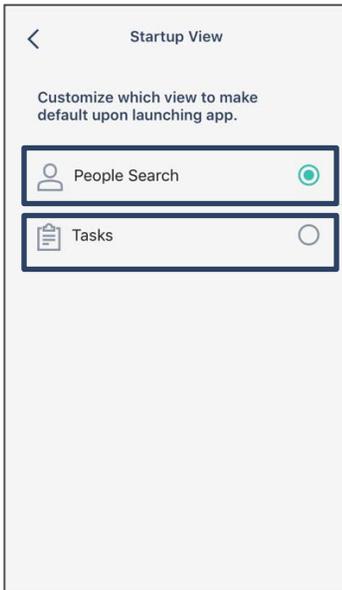
To Edit a Tracked Task:

1. Tap the **Filter** icon
2. Update desired filters and sorting
3. Tap **SAVE** to save changes
4. Tap **X** to return to task List without saving

Settings

The Settings Tab is used to setup portal user preferences along with managing security settings within FellowshipOne Mobile. You can also sign out of the application from the Settings Tab.

Preferences



Users can select preferred Startup View.

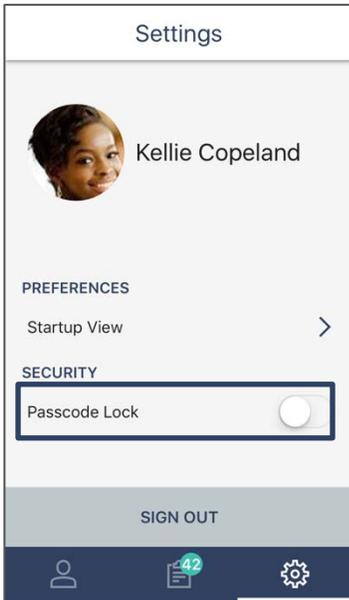
Choose from:

- ❖ **People Search**
- ❖ **Tasks**

NOTE: Only churches on the Premier edition of FellowshipOne see Preferences

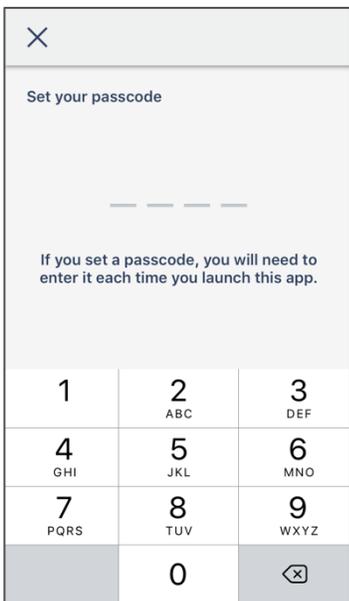
Security

Users have the option to enable a 4-digit Passcode Lock and/or Touch ID. This allows you to enter the application without entering the Username, Password and Church Code.



Toggle on Passcode Lock (Optional)

Passcode Code Lock



When Passcode Lock is enabled, the user enters a 4-digit passcode to login.

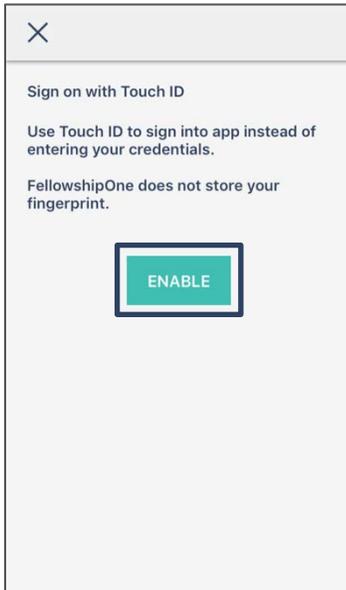
1. Enter 4-digit passcode
2. Confirm 4-digit passcode

Passcode Lock is now enabled.

NOTE: When using a passcode to login, users have 5 attempts to enter the correct passcode. After 5th attempt, passcode is disabled and user must enter Username, Password and Church Code to login.

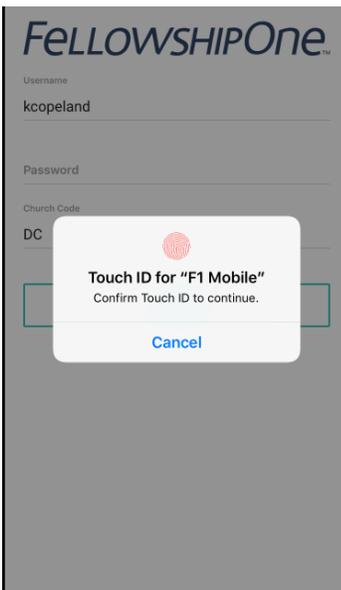
Touch ID

When Touch ID is enabled, the user can use a fingerprint already saved to their mobile device to login.



To enable Touch ID:

1. Toggle Touch ID on
2. Tap **Enable**



Sign Out

Sign Out logs user out of the FellowshipOne Mobile Application.