

### Tips for Recording Group Attendance:

- **Use Your Phone**—Save the website to your phone's home screen, bookmark it, or add it to the reading list. This way you have quick access to the link at any time.
- **Designate a Group Member**—If you would rather *not* be the person taking attendance, designate someone to do it for you each week. You can either let them use your phone after you log in, or email us and request we give that person access to your group online. Once they receive their login, they can use their own device to record attendance.

### Quick Reference for Help:

Email [Jennie.Dunlap@NewVisionLife.com](mailto:Jennie.Dunlap@NewVisionLife.com) for:

- Login Assistance
- Group Access
- Group Leader Toolbox Assistance

Email [Groups@NewVisionLife.com](mailto:Groups@NewVisionLife.com) for:

- Group Detail Changes  
(meeting day, time, etc.)



# GROUP LEADER TOOLBOX TRAINING GUIDE



*Thank you for serving as a small group leader!*

You now have access to your small group online with Group Leader Toolbox. This booklet contains all the instructions you will need to access and manage your group online.

### What You Can Do with Group Leader Toolbox:

- Edit a Group Member's Information—Page 5
- Change a Group Member's Role (member, leader, etc.)—Page 5
- Make a Group Member Inactive—Page 5
- Remove Group Members—Page 5
- Add Group Members—Page 6
- Record Attendance—Page 7
- View Attendance—Page 8
- Email Your Group—Page 9

### Important Things to Know about Group Leader Toolbox:

- **Where to Find It:** [ShelbyNextWeb.NewVisionOnline.net](http://ShelbyNextWeb.NewVisionOnline.net)
- **How to Log In:** You should have received an email with your username and password. If not or you can't find it, go to the website and click the forgot my login to retrieve/reset it.

### Troubleshooting Tips for Group Leader Toolbox:

- **Can't See Your Group?** If after logging in you do not see your group, please email [Jennie.Dunlap@NewVisionLife.com](mailto:Jennie.Dunlap@NewVisionLife.com) to gain access to your group.
- **Group Details Not Correct?** If you need anything changed in the "Group Details" section, please email [Groups@NewVisionLife.com](mailto:Groups@NewVisionLife.com) to have those changes made for you.
- **Can't See the Edit or Delete Icon?** When viewing your group members, if you cannot see the edit or delete icons at the far right of the screen, go down to the bottom of the page and use the scroll bar to move the view to the right until those icons are visible.
- **Questions?** Email [Jennie.Dunlap@NewVisionLife.com](mailto:Jennie.Dunlap@NewVisionLife.com) with questions or call the church office at 615-895-7167.

## LOGIN

To access Group Leader Toolbox, go to the following website:

**[ShelbyNextWeb.NewVisionOnline.net](http://ShelbyNextWeb.NewVisionOnline.net)**

Once there, you will see the following screen:

HOME

Login

Username

Password

Forgot Login ID

Forgot Password

Login

Register for an Account

If you do not currently have a login account and would like to set one up, click the "Register" button below.

Note: If you already have an account that you are using for another area of our website, you do not need to create a new account. Use your current account to login.

Register

If you cannot locate your login information, click on the appropriate "forgot my..." box and follow the steps to retrieve/reset your info.

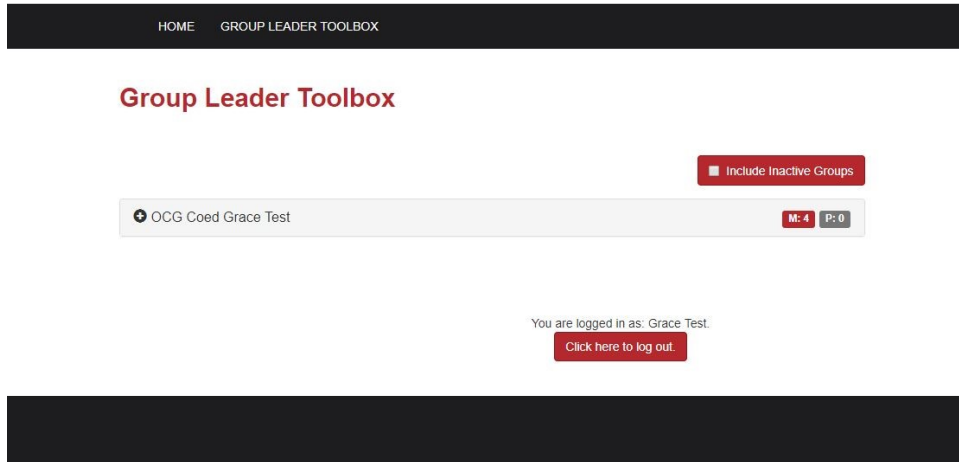
If you do not have a login, click on "Register for an Account". Doing this will allow you to log in, but you will not yet be able to see your group. In order to see your group, you will need access to do so.

If you are creating a new account or if after logging in, you do not see your group, please email Jennie Dunlap and request group access. She will give you the security rights you need and will reply to your email once this access has been granted. You will then be able to view and manage your group in Group Leader Toolbox.



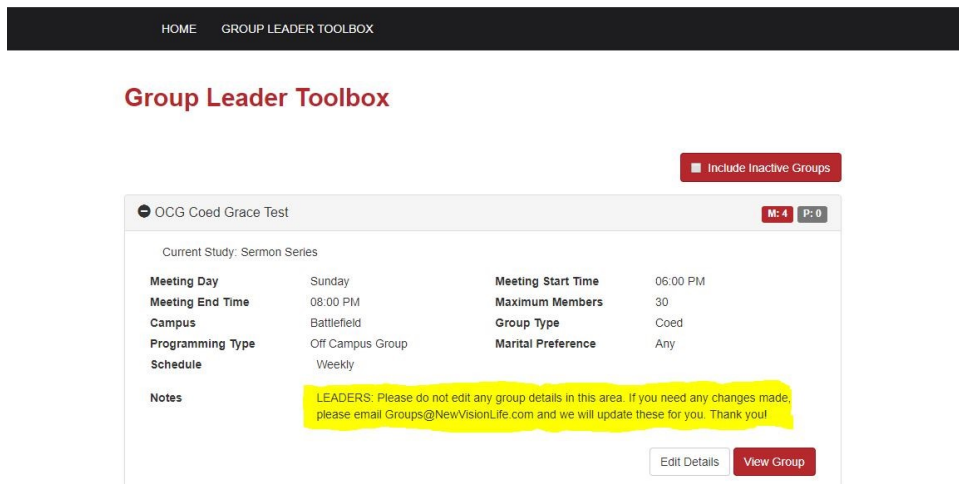
# WELCOME TO GROUP LEADER TOOLBOX

After logging in, you will see your small group(s). Any groups for which you are a leader, co-leader, assistant leader, or coach will display here.



## GROUP DETAILS

Clicking on the + icon next to your group name will display your group details. If anything in this area is incorrect, please email [Groups@NewVisionLife.com](mailto:Groups@NewVisionLife.com) with the changes needed and we will fix these for you. Please do not change anything in this area yourself.



# VIEW GROUP


After clicking on “View Group”, you will see your group members. Depending on your screen size, the EDIT and DELETE icons on the right side of the screen may not be visible. To see and use these features, use the scroll bar at the bottom and slide the bar to the right.

## OCG Coed Grace Test

OCG Coed Grace Test									
Record Attendance View Attendance Add Member Communications									
Include Inactive Members									
<input type="checkbox"/>	Name	Phone	Address	Email	Birthdate (Age)	Member Role	Active	Active/Inactive Date	
<input type="checkbox"/>	Grace Test	C: (615) 555-3434	301 Red Hawk Blvd Smyrna, TN 37167-6756	jenniedunlap77@gmail.com	04/11/1979 (39)	Leader	<input checked="" type="checkbox"/>	Active: 07/28/2016	
<input type="checkbox"/>	Jennie Dunlap	C: (615) 406-7718	301 Red Hawk Blvd Smyrna, TN 37167-6756	jennie.dunlap@newvisionlife.com	04/13/1977 (41)	Member	<input checked="" type="checkbox"/>	Active: 07/03/2018	
<input type="checkbox"/>	Missus Person	C: (615) 222-2222	2020 Bright Ct. Murfreesboro, TN 37129	missus@home.com	02/21/1988 (30)	Member	<input checked="" type="checkbox"/>	Active: 07/03/2018	
<input type="checkbox"/>	Mister Person	C: (615) 555-5555	2020 Bright Ct. Murfreesboro, TN 37129	mister@home.com	03/01/1985 (33)	Member	<input checked="" type="checkbox"/>	Active: 07/03/2018	
<input type="checkbox"/>	Sally Example	C: (615) 660-6061	1900 Downthway Dr. Murfreesboro, TN 37129	Sally@example.com	06/01/1982 (36)	Member	<input checked="" type="checkbox"/>	Active: 07/03/2018	
<input type="checkbox"/>	Sam Example	C: (615) 660-6060	1900 Downthway Dr. Murfreesboro, TN 37129	Sam@example.com	01/01/1980 (38)	Member	<input checked="" type="checkbox"/>	Active: 07/03/2018	
Page 1 of 1 Page Size 10 Items									

The edit icon is and the delete icon is . You have the ability to edit the member role for each person along with editing their basic contact info. You can also make people inactive or delete them from your group.





## EDIT INFO FOR GROUP MEMBERS

To edit any info for a group member, click on the  and make the appropriate changes.



You have the ability to change the following personal information for your group members: cell phone, email address and birthdate.

You also have the ability to change the role of your group members to any of the following: leader, co-leader, assistant leader, coach, non-resident member or prospect.

Finally, you can change a member from active to inactive by removing the checkmark next to “Active”.

HOME GROUP LEADER TOOLBOX									
OCG Coed Grace Test									
Record Attendance View Attendance Add Member Communications Include Inactive Members									
<input type="checkbox"/>	Name	Phone	Address	Email	Birthdate (Age)	Member Role	Active	Active/Inactive Date	
<input type="checkbox"/>	Grace Test	C: (615) 555-3434	301 Red Hawk Blvd Smyrna, TN 37167-6766	jenniedunlap77@gmail.com	04/11/1979 (39)	Leader	<input checked="" type="checkbox"/>	Active: 07/28/2016	 
<input type="checkbox"/>	Missus Person	C: (615) 222-2222	2020 Bright Ct. Murfreesboro, TN 37129	missus@home.com	02/21/1988 (30)	Member	<input checked="" type="checkbox"/>	Active: 07/03/2018	 

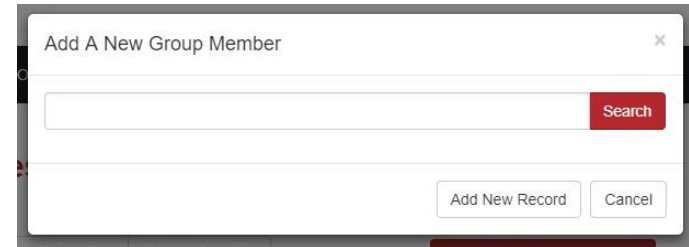
## REMOVE GROUP MEMBERS

To remove people from your group, simply click the  to the right of the person's name you would like to remove. Alternatively, you could make the person inactive with the  rather than delete them from your group.

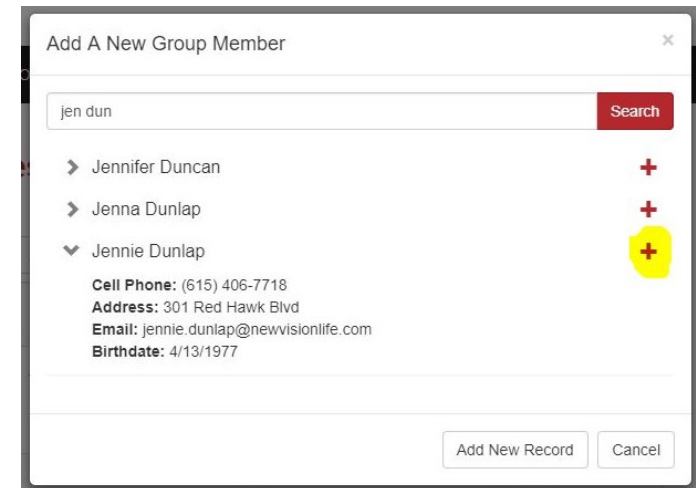
*\*Don't forget to use the scroll bar at the bottom if you can't see the icons.*

## ADD GROUP MEMBERS

To add new group members, click on the “Add Member” tab which is located under your group name. The following screen will appear.



Type any combination of letters in the order of firstname lastname and click search. Everyone who matches your specified search in the church database will show in the results. Click on the arrow to the left of the person's name to see the person details. There are many people with duplicate names in the database and looking at the person details will help you find the correct person. To add the person to your group, click the **+** to the right of their name.



If you do not find the person in the database and need to add a new record, click on “Add New Record” at the bottom and enter their information. This will add the person to both the database and your group.

## RECORD ATTENDANCE

Record attendance by clicking the "Record Attendance" tab. Your meeting date and time will autofill and there is no need to change these unless you are recording attendance for a past day (times don't matter). Click once on any person's name who is NOT in attendance and it will move their name to the "Absentee" column. You can add any notes you would like the ministry team to see in the "Notes" section. Then click "Save".

After saving your attendance, you will see a confirmation that attendance was recorded.

### OCG Coed Grace Test

Recorded Attendance for 4 attendees!								
<div> Record Attendance View Attendance Add Member Communications </div> <div> <input type="checkbox"/> Include Inactive Members </div>								
<input type="checkbox"/>	Name	Phone	Address	Email	Birthdate (Age)	Member Role	Active	Active/Inactive Date
<input type="checkbox"/>	Grace Test	(615)	301 Red Hawk Blvd	jenniedunlap77@gmail.com	04/11/1979 (39)	Leader	<input checked="" type="checkbox"/>	Active: 07/28/2016

## VIEW ATTENDANCE

After attendance is recorded, you can view attendance by clicking on the "View Attendance" tab. To return to the normal group member view, click on the "Hide Attendance" tab.

Name	OCG Coed G... 6/24/2018	OCG Coed G... 7/3/2018	First Time	Last Time	Total	
Dunlap, Jennie	✓	✓	6/24/2018	7/3/2018	2	100 %
Example, Sam	✓		6/24/2018	6/24/2018	1	50 %
Example, Sally	✓		6/24/2018	6/24/2018	1	50 %
Person, Missus	✓	✓	6/24/2018	7/3/2018	2	100 %
Person, Mister	✓	✓	6/24/2018	7/3/2018	2	100 %
Test, Grace	✓	✓	6/24/2018	7/3/2018	2	100 %

Page 1 of 1 Page Size 10 Items

To change the displayed dates in the attendance view, add your specified dates in the "From" and "To" date fields and click "Search".

# EMAIL GROUP MEMBERS

To email any or all of your group members, click on the "Communications" tab. The following screen will appear:

Send Communication

☒ Email  
☐ SMS/Text

**Recipients**

Grace Test
Jennie Dunlap
Missus Person
Mister Person
Sally Example
Sam Example

**Non-Recipients**

Subject: Subject

Design | HTML | Preview

Send Cancel

By default, all group members will be in the “Recipients” column. Click on the name of anyone you do NOT want to receive your email and this will move them into the "Non-Recipients" column. Next, type your subject and body, then click send.