

BASIC TRAINING

infoodle
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GETTING STARTED
TRAINERS MANUAL

1
LEVEL

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Trainer Notes

Before the training session starts make sure that each attender (trainee) has been set a role (by the infoodle administrator) and sent a login. Ask the trainee to print the email with their logins and bring to the training session.

Think about how you will conduct the training session:

- Where will you carry out the training session?
- Will you demonstrate using a projector/overhead screen?
- Will each student work from their own laptop or sit at a desktop computer?
- Does everyone have access to the internet/WiFi?
- Will you need a microphone?
- How many people do you think you can train at one time?
- Make sure you have enough trainee hand-outs printed.
- What do you want them to learn?
- Ensure each person has been given permission in their Role to do what you want to train them on. (This will be set by the Infoodle administrator).

This manual covers the following topics:

- User be able to login successfully
- User be able to search and find people
- User be able to edit people (if role allows)
- Access mobile site

Why do we use Infoodle?

Infoodle is a tool that not only has cool features but is used to equip you and your organisation to do the job you are required to do. That is to care, include and encourage everyone in your community.

In the church setting this means, infoodle is a tool to help equip the saints to fulfil their ministry and to build up the church. Ephesians 4:12

INFOODLE BASIC TRAINING

1

Logging-in

1. Enter the URL into the web address box at the top of your screen.

Show the students where to type in your organisation URL address. This could be your organisation name or an acronym then .infoodle.com



e.g. <https://demo.infoodle.com>

Explain not to use the google search bar as this will not find it.

Ask the students to fill in their hand outs with the URL address

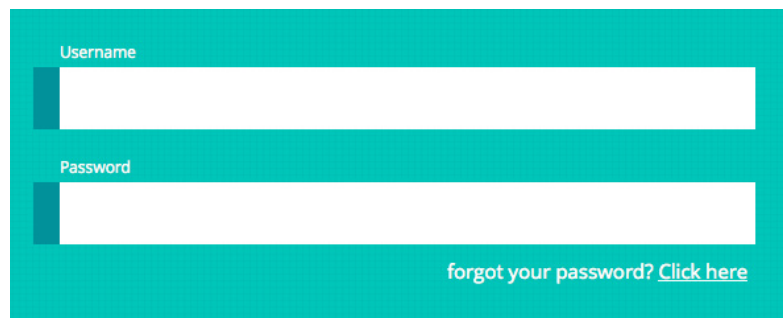
2. Enter your User name and password.

Ask everyone to get out their email with the login details, or have the email open.

Copy the user name and type into the box. Usually this will be the persons first name then dot then surname.

Then type in the password. Explain that this is case sensitive. A good tip is if they have their email open to just copy and paste it then it will be correct.

If they have forgotten the password, by clicking on the **click here** a new email will be sent to them with new Password. Then click on **Login**.

A screenshot of a login form. It has two input fields: "Username" and "Password". Below the "Password" field, there is a link that says "forgot your password? Click here".

forgot your password? [Click here](#)

Change your password

Passwords can be changed by the user on their own profile page.

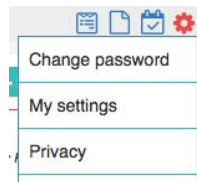
Step 1. Ask the students to click on **my profile**. This will take them to their profile page.



Step 2. Click on the cog in the top righthand corner. A drop down list will appear.



Step 3. Click on **My Settings**.



Step 4. Type in your new Login and password, confirm password.

Login information	
Login	<input type="text" value="administrator"/>
Password	<input type="password"/>
Confirm Password	<input type="password"/>

Step 5. Click **save** at the bottom of the screen.

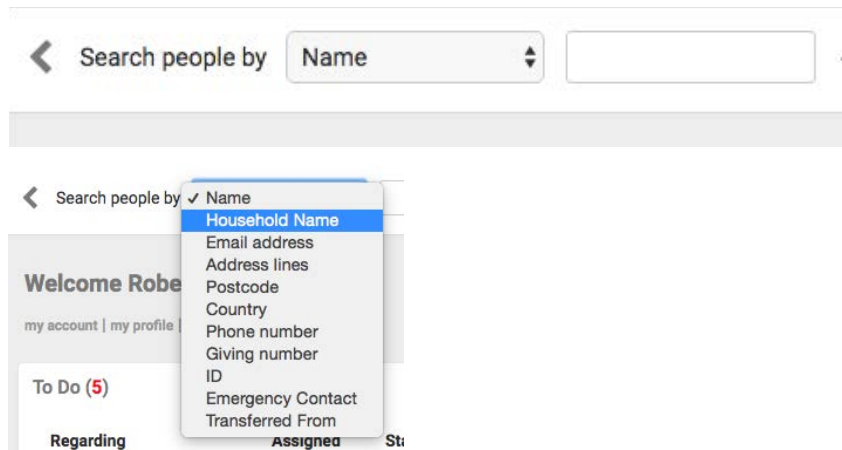


Ask the students to fill in their new username and password in their hand outs

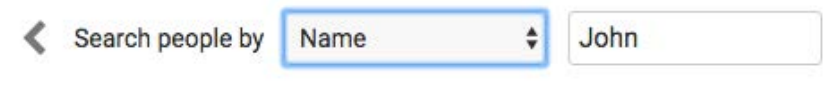
How to search for people

Where ever you are in the site the way to find people is through the search box at the top of the screen. Get each student to search for themselves.

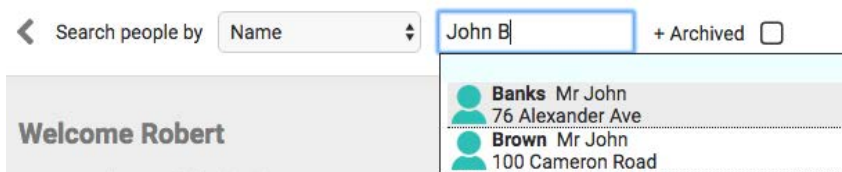
Step 1. Choose how you want to search: by Name, Address, Phone number etc. The default is **Name**.



Step 3. Start typing in the Name in the search box.



A drop down with several names may appear. Select your name, you will notice the one selected becomes slightly grey. By clicking on it you will be taken to that profile page.



When in the page ask the student to check their details. Now is a good time to explain that each person only has access to people, groups or events that they have been given access to in their **role**. (This will have been set by your organisations infoodle administrator) Normally a person can only see people, groups or events that they are a part of. (Unless they have been given more access in their role)

A person can be given **Limit view to just directory settings** in their role. This gives them the same as a printed directory view i.e. name and contact details that will appear in a printed directory.

Next explain how they can change their details.

Changing a persons details

Changes are made by clicking on the edit buttons. The **edit** button closest to the top left edits your personal details, e.g. your cell phone or your work phone. The edit button inside the address box edits household details i.e. details that relate to everyone in the household like home phone number and address. If you change the household details the change will appear in each member of this households page.

Change personal details

Click on the edit button closest to the top left of the screen.

By clicking on this you will be taken to a page that shows all the fields that can be filled in.



Simply click in a box and start typing.

Title	Mr
Firstname	John
Middlename	
Lastname	Banks
Gender	Male

Other boxes may have a pre-set selection to choose from.

Gender	Male
	Female

Please explain the need to tick the box for cell phone numbers so that should a text need to be sent the system knows it is a **cell** phone member.

In the same way **Active?** needs to be ticked in order to send emails. It may be that a person has several email addresses but wish to receive news letters etc only at the home/family email address. Only those email addresses that have **Active?** ticked will receive emails.

To add more email or phone numbers click on the plus button. The minus button will remove.

Phone numbers	Mobile	027 345 6789	Cell?	<input checked="" type="checkbox"/>	+ -
Email address	Main	admin@mytauranga.org.nz	Active?	<input checked="" type="checkbox"/>	+ -
	Work	Banks@work.org.nz	Active?	<input type="checkbox"/>	+ -

Personal Privacy


Phone numbers	Mobile	027 345 6789	Cell? <input checked="" type="checkbox"/>	+ -	Visible Private
Email address	Main	admin@mytauranga.org.nz	Active? <input checked="" type="checkbox"/>	+ -	Visible Private


Explain that the **visible or private** buttons relate to the Directory. Depending on what is selected will be visible in the printed directory and in the on-line directory. Each person can choose how much information is printed in the directory and visible in the on-line directory. If a person only wants their email available but not cell phone numbers the email address will set as visible and the cell phone private as in example.

You can easily see if a person has been set to visible or private by the red or green dots beside contact details. See example below where all are set as visible. (For further details see Household Privacy on following pages)
Tip: Remember to save any changes you have made.

Change household details

Household Details

Guardians
 Edna Brown

Children
 Fred Brown

Add new member ● edit

Main +

Ms E. Brown ● edit

39 West Tamaki Rd ● QR Code

Glen Innes ● Map

Auckland 1072 ● Privacy

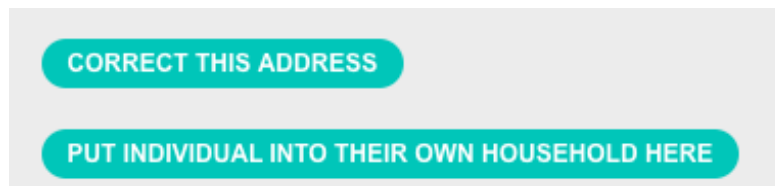
Phone : 021 657 301 ●

Scroll down a person's profile page and you'll find their Household details.

In this example we see that Edna Brown lives with her son Fred.

If for any reason you need to change the address simply click on the **edit** inside the address box.

To change the address click on **Correct this address**.

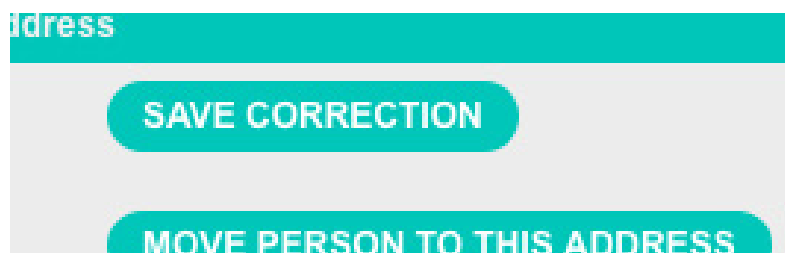


Start typing in the **street address** box the new address.

Note: It may be that some addresses pop up. Select these only if the address is the same.

A screenshot of an address form. The "Street address*" field is highlighted with a blue border and contains the text "39 West Tamaki Rd". Other fields include "Household name", "Address line 2", "Area" (Glen Innes), "City" (Auckland), "Postcode" (1072), "Country" (New Zealand), "Phone" (021 657 301), and "Fax". A "Set address" link is visible in the top right corner.

Once you have typed in the correct new address click on **save correction**.

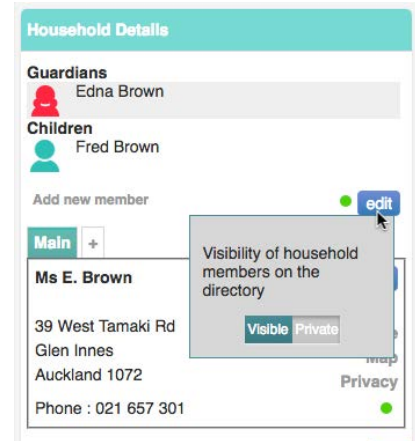


This change will appear on each member of this households page. Further changes will be covered in other training sessions.

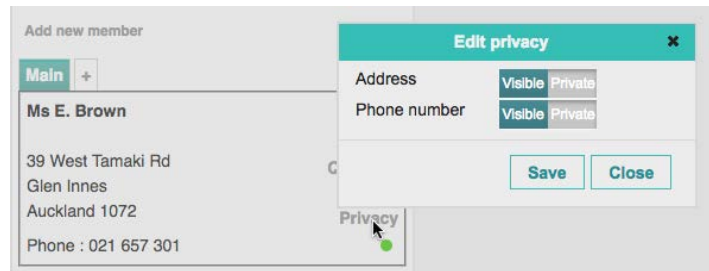
Household Privacy

As mentioned in the previous pages, you can set the household **privacy** by clicking one of the options here.

If all details need to be changed click on the **edit** button above the address box and select the option you want i.e. Visible or Private.



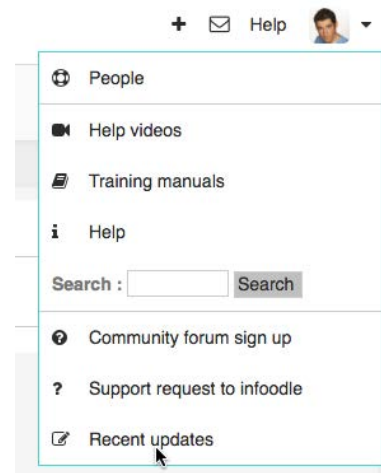
If either address or phone number needs to be set click on the **privacy** button inside the address box. Select and save.



Help

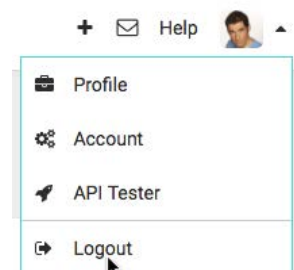
Helpful notes and videos are available to everyone and found in the help pages. Simply click on **Help** at the top of the screen. You will be taken to a page with lists of headings and features. Search what you need help with and click on it.

It is also good to click on **Recent Updates** regularly as this is where you can find information on all the recent changes to the system that have been made.



Logging out

When you have done all you want to do click on **Logout** at the top of the screen.



How to use the mobile site

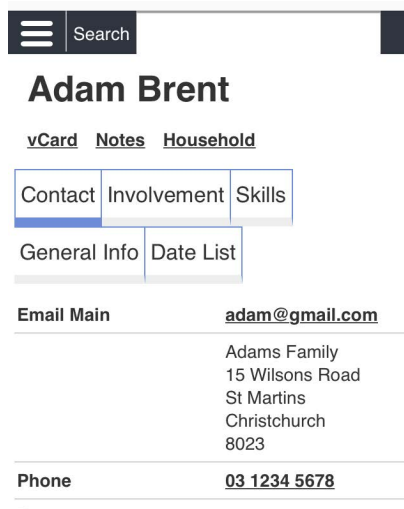
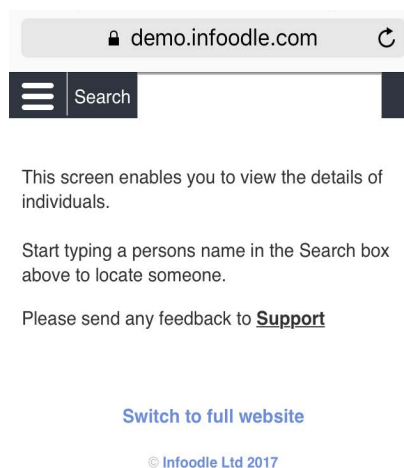
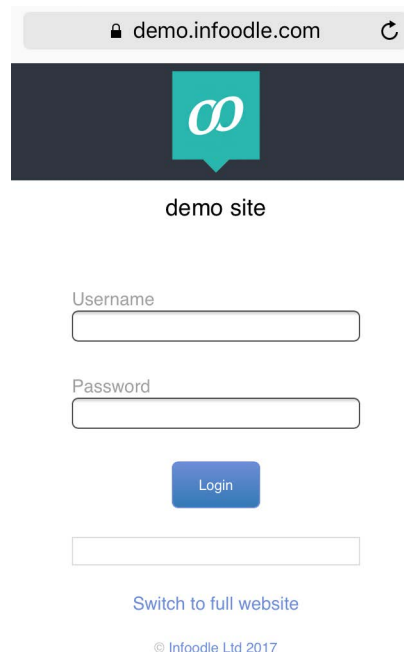
Step 1. Go to your web browser and enter your url (as in **1. Logging in** - page 2)

Step 2. Enter your username and password and select **Login**. This gives you an easy search version.

Step 3. In the **Search** box enter the name of the person you require and select their name. If you want the full website select [Switch to full website](#).

Step 4. You can now see their details on your screen.

Select **Logout** when you are done.





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