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# WORKING CONTACTS

## TRIAGE, TRANSFER AND PAPER

Christie Fitzgerald

Fellowship Technologies



# WORKING CONTACTS

## TRIAGE, TRANSFER AND PAPER

- **5 Methods**
  - Work Using the Portal
  - **Work Using Paper**
  - **Work by Triage and Transfer**
  - Work by Multi Close
  - **Work Using Group Manager**



# WORKING CONTACTS

## TRIAGE, TRANSFER AND PAPER

- **Work a Contact – The Basics**
  - Two ways to access your assigned contact items
  - Three contact statuses
  - Actions associated with contact list
  - View unassigned items in your ministry



# WORKING CONTACTS

## TRIAGE, TRANSFER AND PAPER

- **Work a Contact – Paper**
  - Running contact reports
    - Contact worksheet reports
    - Contact reports in Excel
  - Entering contact notes and dispositions
  - Closing contacts



# WORKING CONTACTS

## TRIAGE, TRANSFER AND PAPER

- **Work a Contact – Triage and Transfer**
  - Perform Triage
  - Transfer the Item(s)
    - Individual Transfer
    - Mass Transfer
  - Perform Follow-Up



# WORKING CONTACTS

## TRIAGE, TRANSFER AND PAPER

- **Work a Contact – Group Manager**
  - Share the Contact
  - Review the Contact
  - Make Contact
  - Enter Notes
  - Close Contact



DEMO



# THANK YOU

For more information:  
[education@fellowshiptech.com](mailto:education@fellowshiptech.com)

Thank you so much!!!

