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# WORKING CONTACTS IN FELLOWSHIP ONE

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# WORKING CONTACTS

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



# WORKING CONTACTS IN FELLOWSHIP ONE

- **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 IN FELLOWSHIP ONE

- **Managing Contacts**

- Contact options
- Purpose of contact method
- Difference between contact note and confidential note
- Purpose of share notes with



# WORKING CONTACTS IN FELLOWSHIP ONE

- **Work a Contact – Ministry Tab**
  - Transfer a contact
  - Purpose of share with group
  - When to apply a disposition
  - When to close a contact



DEMO



# RECOMMENDED REPORTS

- **Monitor Results**
  - M4025
  - M4026
  - M4028



# THANK YOU

For more information:  
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Thank you so much!!!

