

Easy Twin Tutorial

Purpose

The purpose of this document is to show how conference members, especially Presidents and Treasurers, can use the twinning app to facilitate the SVdP twinning process where a conference President can request help and other conferences have the opportunity to help by making a pledge. Almost all of the screen shots are from a Demo database so they do not reflect real twinning between conferences.

This process can be done using only email, but there are some advantages to doing it with an app.

1. Minimizes email.
2. Twinning request balance is available real time.
3. Mailing instructions are included in the pledge notification.
4. Provides visibility to the twinning process.

Process

The twinning process is the following:

1. President or Treasurer logs in and edits the mailing address for the conference. This is a one time task and can be modified if necessary. A twinning request can not be added without the definition of the mailing address.
2. The President clicks on Add Twin Request and fills in the required fields. Clicking on Add Request results in adding a new twinning request and sends an email notification to all the conference Presidents. The notification consists of a web address for the added twinning request. Clicking on the web address will display the new twinning request.
3. Clicking on the web address displays the need information, the request amount, balance, and who has pledged so far. Also included is a pledge button and a pledge amount field, and a "Send Request to me" button.
4. A President receiving the twinning request can click on the request to see if it should be considered further. If so, clicking on the "Send Request to me" button will send the details of the request to the President via email which can be forwarded to whoever is required for the process of making a pledge. The name and address of the neighbor is not included in this email.
5. If the conference decides to pledge, filling in the pledge amount and clicking on the Pledge button will result in a new balance, and an email is sent to the President and Treasurer(s) in the conference and contains the pledge details and the payment instructions.
6. When the balance goes to zero, the pledge button is no longer displayed. The status of the request is changed from Active to Complete, and The President and Treasurer(s) of the requesting conference will be sent an email notification that the balance is zero.

Login

The login display looks like this:




St. Vincent de Paul - Demo Twinning Log in

Enter email address and password. The password field is case sensitive.

Email address:

Password:

The password field is case sensitive. Entering your email address and the correct password will result in the display of the home page that looks like the screenshot below. The Add Twin Request and Manage People buttons are only displayed if the person logged in is a President or Acting President. See section Login Problems if you are not able to log in.



St. Vincent de Paul - Demo Twinning Requests

Welcome Seton President. Today is November 19, 2022.

Search

Request Number	Status	Request Date	Requested Amount	Total Pledges	Remaining Balance	Conference	Edit
5	Active	11/09/2022	1000	0	1000	St. Elizabeth Ann Seton-Plano	Edit Request
4	Active	11/04/2022	700	200	500	Christ The King-Dallas	
3	Canceled	11/04/2022	600	0	600	Christ The King-Dallas	
2	Active	09/23/2022	700	200	500	All Saints-Dallas	
1	Active	09/23/2022	900	100	800	All Saints-Dallas	

Note that the Edit Request option is only displayed if the person signed in belongs to the conference that issued the request. The status of a request can be Active, Complete, or Canceled. When the balance goes to zero, the status is changed from Active to Complete. A person might want to change a request from Active to Canceled if the request is no longer needed or to Complete if they no longer want anyone to pledge. The ability to make a pledge is only possible if the request status is Active.

A President or Treasurer can modify any of the fields for a twinning request that belongs to that conference by clicking on the appropriate Edit Request link.

Clicking on a request number will display the information for that request. If the request status is Active, a President or Treasurer can make a pledge. Note that a pledge can also be deleted as long as the person who is signed in belongs to the conference that made the pledge.

Clicking on a request number displays that request as well as buttons to submit a pledge and a button to send the request via email. Any pledges are listed at the bottom as well as the mailing instructions.

Welcome The President. Today is August 31, 2022.

Request number: 4
Request Date: 08/30/2022
Request Amount: 800 Request Balance: 500
Requested by: Acting President at All Saints-Dallas
Request status: Active
How will the funds be used?:

Water bill

Neighbor's Story - Include the full name and address of the neighbor:

Had a leak which waster 50,000 gallons of water.

Amount the requesting Conference plans to contribute:

250

Pledge amount:

Pledges

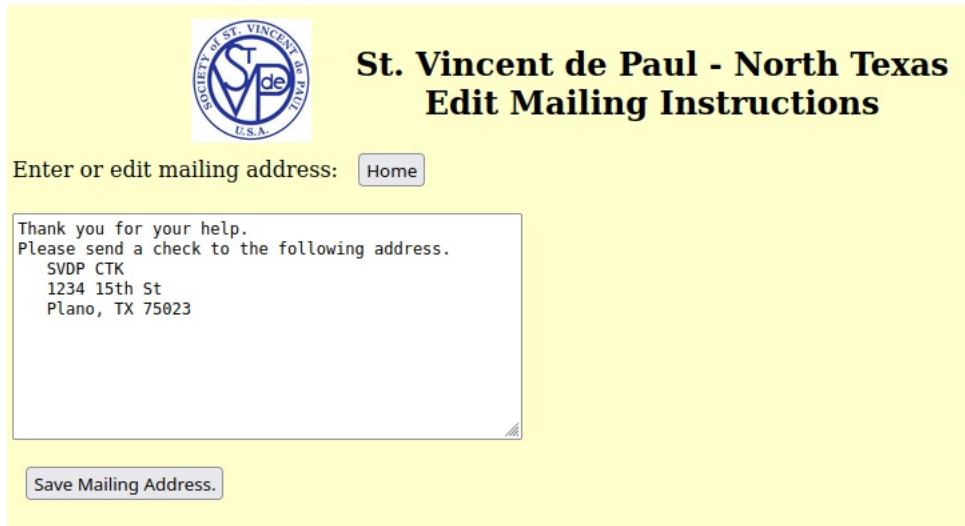
Date	Amount	Conference	Delete
08/30/2022	300	Christ the King-Dallas	Delete pledge

Payment instructions:

Send check to All Saints

Edit Mailing Address

Clicking on the Edit Mailing Address button displays the payment instructions:



The screenshot shows a web page with a yellow background. At the top left is the St. Vincent de Paul U.S.A. logo. To its right is the title "St. Vincent de Paul - North Texas Edit Mailing Instructions". Below the logo is a text input field with the placeholder "Enter or edit mailing address:" and a "Home" button to its right. Below the input field is a white box containing the text: "Thank you for your help. Please send a check to the following address. SVDP CTK 1234 15th St Plano, TX 75023". At the bottom left of the page is a "Save Mailing Address." button.

The mailing address only has to be entered once or whenever it changes. This information is sent to the President and Treasurer of the conference whenever a pledge is made.

Example emails:

You have made a pledge to Christ the King-Dallas for \$ 100 on 03/26/2022.

[Click here to display Twinning Request](#)

Payment Instructions

Thank you for your help.

Please send a check to the following address.

SVDP CTK

1234 15th St

Plano, TX 75023

Example email when twinning request balance goes to zero.

This is sent to the president and treasurer of the conference that made the request.

[Name],

The remaining balance for twinning request 13 is zero.

[Click here to see Twinning Request](#)

Add Twin Request

Here are the fields that are required when a president clicks on the Add Twin Request button.



St. Vincent de Paul - Demo New Twinning Requests

Name:

Conference:

Request Date:

Amount Requested: *

How will the funds be used? *

Neighbor's Story - Include the full name and address of the neighbor: *

Amount the requesting Conference plans to contribute: *
Example CTK will pay \$500 and requests twinning of \$1,000.

Add Request

There is a confirmation message displayed for most transactions:

Welcome Luis Gonzalez. Today is July 4, 2022. **Pledge for \$ 100 has been added.**

Welcome Luis Gonzalez. Today is July 4, 2022. **Pledge for \$ 100 has been deleted.**

A special case exists if someone deletes a pledge, and the balance for the twinning request is no longer


zero. If the status is not Canceled, an email is sent to the President and Treasurer that the balance is no longer zero. That conference may want to change the status from Complete to Active.

Reports

There are five reports that are available by clicking on the Reports button.



The “Who Is Who” report lists the presidents and treasurers for each conference. The first four columns of information is current and is maintained by the president of each conference. Below is a sample in the Demo database. There is no need to keep a list of the presidents, treasurers and their email addresses in a different location. Clicking on the title in the column sorts the data by the contents of that column.



St. Vincent de Paul - Demo Who Is Who

Clicking on the column title will sort the table by that column. Clicking on the same column title again will result in a reverse sort of the table.

Home

Name	Role	Email Address	Phone	Conference	Mailing Instructions
Acting President	Acting President	russ@keen2.org		All Saints-Dallas	Send check to All Saints
Another Treasurer	Treasurer	russ.keenan2@gmail.com	123-456-7890	All Saints-Dallas	Send check to All Saints
App Admin	Admin	russ.keenan2@gmail.com		None	Thank you for your help.
New President	President	russ@keen2.org		Christ the King-Dallas	
The President	President	wrk@keen2.org		All Saints-Dallas	Send check to All Saints
The Treasurer	Treasurer	russ@keen2.org		All Saints-Dallas	Send check to All Saints

Home

Clicking on the Twinning Requests and Pledges button displays a date range. The default is the current year. Clicking on Submit Dates then displays a request and pledge report. This is just test data from a Demo database.

☐ Current Fiscal Year
☐ Current Calendar Year
☒ Custom Date Range

Start Date 
 End Date 

Request Report from 01/01/2022 to 12/31/2022

Conference	Number	Total
All Saints-Dallas	6	\$ 6,300
Christ the King-Dallas	5	\$ 4,900
Demo	1	\$ 1,654
Mary Immaculate-Farmers Branch	1	\$ 3,500
St. Elizabeth Ann Seton-Plano	9	\$ 10,000
St. Joseph-Waxahachie	1	\$ 100
St. Pius X-Dallas	6	\$ 5,800
St. Thomas Aquinas-Dallas	2	\$ 2,100

Total number of requests 31
 Total amount requested \$ 34,354
 Smallest request \$ 100
 Largest request \$ 3,500
 Average request \$ 1,108

Pledge Report from 01/01/2022 to 12/31/2022

Conference	Number	Total
All Saints-Dallas	6	\$ 2,050
Christ the King-Dallas	11	\$ 1,601
Good Shepherd-Garland	3	\$ 600
Holy Family of Nazareth-Irving	1	\$ 999
Mary Immaculate-Farmers Branch	3	\$ 675
None	20	\$ 2,246
Our Lady of the Lake-Rockwall	2	\$ 110
St. Elizabeth Ann Seton-Plano	32	\$ 5,133
St. Joseph-Waxahachie	1	\$ 10
St. Mark the Evangelist-Plano	3	\$ 300
St. Michael the Archangel-McKinney	2	\$ 450
St. Monica-Dallas	3	\$ 600
St. Pius X-Dallas	4	\$ 780
St. Thomas Aquinas-Dallas	4	\$ 3,600

Total number of pledges 95
 Total amount pledged \$ 19,154
 Smallest pledge \$ 1
 Largest pledge \$ 3,000
 Average pledge \$ 201

Selecting the “Organization Structure” button displays each organization and the parent organization. Partial report for the Austin Council:

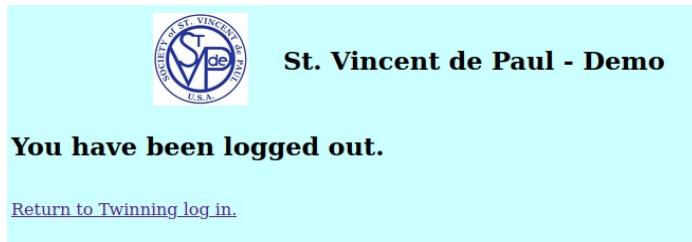
Conference District Council	District Council Region
Austin Central District	Central Texas Council
Austin North District	Central Texas Council
Austin South District	Central Texas Council
Bryan/College Station	Central Texas East District
Central Texas Council	South Central Region
Central Texas East District	Central Texas Council
Central Texas North District	Central Texas Council
Central Texas South District	Central Texas Council
Christ the King - Belton	Central Texas North District
Holy Cross - Austin	Austin Central District

Clicking on the District report displays a date range and then a summary by district.

Request Report from 07/01/2022 to 12/31/2024		
District	Number	Total
District 1	2	1600
District 2	4	2100
District 4	2	1300
Number of requests 8 Number of canceled requests 0 Total Amount requested \$ 5,000 Smallest request \$ 100 Largest request \$ 1,000 Average request \$ 625		
Pledge Report from 07/01/2022 to 12/31/2024		
District	Number	Total
District 2	11	1901
Total number of pledges 11 Total amount pledged \$ 1,901 Smallest pledge \$ 50 Largest pledge \$ 500 Average pledge \$ 172		

Log Out

Clicking on the Log Out button will log out the user.



Clicking on Return to Twinning log in will display the login page.

Search Function

Entering one or more characters (a string) into the Search text field and pressing the Enter key will request the app to list all the twinning requests where that string is found in the request or in any of the pledges made to that request. The app will display one of the following:

Today is September 7, 2022. **There were no matches for "error".**

If there was one or more matches, the app will display those twinning requests where a match occurred.

Search results for Sacred Heart-Rowlett - 3 records

Request	Request Status	Request Date	How Used	The Story
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The data is not shown since The Story contains sensitive information.

Note that the result would be the same if the search string is sacr. Search is case independent.

The search function is useful if a conference wants to know

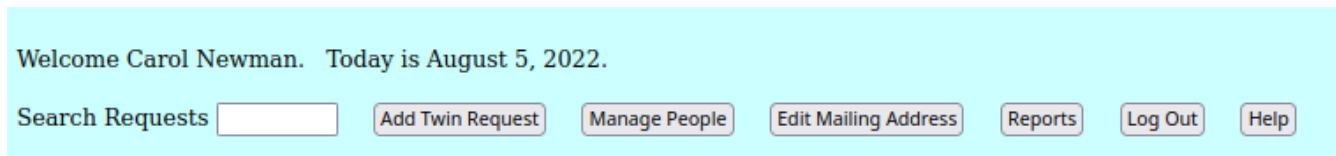
1. Which twinning requests they have made pledges to. (search on conference name)
2. Find an individual twinning request if they know the name of the neighbor.
3. Find activity by a certain conference member. (search on member name)

Clicking on the Request number will display that request and the pledges associated with that request.

Manage People Data

For the twinning app to work properly, it requires each conference to maintain People data for their key leaders (President and Treasurer). The instructions below show presidents how to add and update People data to address common needs within each conference.

The home page displays the Manage People button.



The president is responsible for managing the contact information in the twinning app. This allows the president to do the following:

1. Add a new Treasurer.
2. Add an Acting President or new President.
3. Change the status of any person record to Active or Inactive.
4. Change the password of any person record.

The information for each person record includes the following:

Name - The name is in title case format. Example: Carol Newman

Role - The Role is either Treasurer, President or Acting President.

Email address

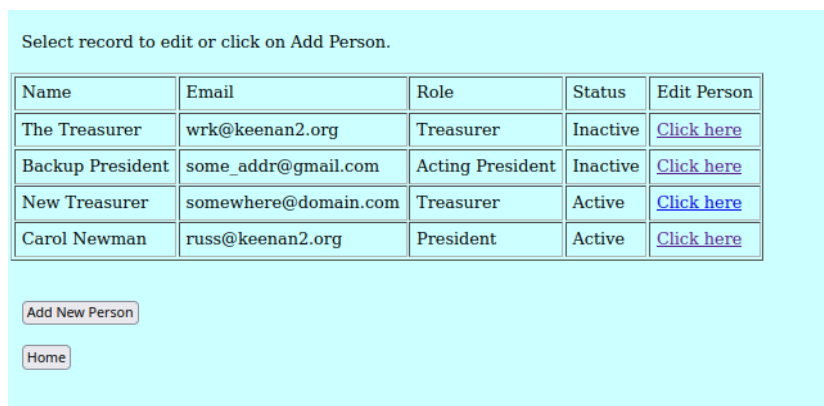
Password

Status

The default password is the password for the conference. Each person can have their own password which supersedes the conference password.

Status is either Active or Inactive.

Clicking on Manage People will display a list of the twinning app users.



The president can click on the Add New Person button to add a new President, Acting President or Treasurer. The president can click on the “Click here” to edit the information for an existing person.

Adding a new person.

The form is titled "Adding a new person" and is set against a light yellow background. It contains two main sections separated by horizontal lines. The first section includes fields for "Name *" (text input), "Email Address *" (text input), "Password *" (text input), and "Status *" (dropdown menu with "Active" selected). The second section includes "Role 1 *" (dropdown menu with "President" selected), "Conference 1" (text input with "St. Elizabeth Ann Seton-Plano" entered), "Phone 1" (text input), and "Notify 1 *" (dropdown menu with "Yes" selected). Below this is a third section with "Role 2" (dropdown menu with "None" selected), "Conference 2" (text input with "None" entered), "Phone 2" (text input), and "Notify 2" (dropdown menu with "Yes" selected). At the bottom of the form are two buttons: "Save" and "Home".

If the person can not be added because there is already a person with that name, a middle initial or a name variation can be added to distinguish this person. Note that role 2 is for the rare case where a person is serving in two different roles like District President and Treasurer.

Phone and Notify are only displayed if the council uses those fields.

Editing the information for an existing person.

Record Number:	13	Gen. Date:	09/23/2022	Last Updated on:	11/09/2022
Name *	<input type="text" value="Seton Treasurer"/>				
Email Address *	<input type="text" value="treas@gmail.com"/>				
Password *	<input type="text" value="Twin1783"/>				
Status *	<input type="button" value="Active"/>				
<hr/>					
Role 1 *	<input type="button" value="Treasurer"/>				
Conference 1	<input type="text" value="St. Elizabeth Ann Seton-Plano"/>				
Phone 1	<input type="text"/>				
Notify 1 *	<input type="button" value="Yes"/>				
<hr/>					
Role 2	<input type="button" value="None"/>				
Conference 2	<input type="text" value="None"/>				
Phone 2	<input type="text"/>				
Notify 2	<input type="button" value=""/>				
<hr/>					
<input type="button" value="Save"/>					

Automatic Notification

When the president adds a new member or modifies an existing member and the status changes or the role changes, email is automatically sent to the council with this change. The president no longer needs to inform the council of such changes.

If a treasurer has served their term or is leaving, the status needs to change from Active to Inactive.

If an existing person whose status is Inactive takes on the role of president or treasurer, then the status needs to change from Inactive to Active, and the role changed to either president or treasurer.

If a new person is serving as president or treasurer, then that person has to be added with the correct information (Name, Role, Email address, Password, and Status).

If a president is going on vacation, the following should work well:

Add an Acting President if one is not already available.

Change the status of the Acting President to Active.

The Acting president can then do anything in the app that a president can do.

When the vacation is over, change the status back to Inactive. The Acting President can not longer log into the app.

By managing the information, there is no delay in appointing a new treasurer. There is no need to ask someone to change something in a database. The changes take place real time.

Welcome The President. Today is August 31, 2022.

Request number: 4

Request Date: 08/30/2022

Request Amount: 800 Request Balance: 500

Requested by: Acting President at All Saints-Dallas

Request status: Active

How will the funds be used?:

Water bill

Neighbor's Story - Include the full name and address of the neighbor:

Had a leak which waster 50,000 gallons of water.

Amount the requesting Conference plans to contribute:

250

Pledge amount:

[Commit Pledge](#)

[Email Request to me](#)

Pledges

Date	Amount	Conference	Delete
08/30/2022	300	Christ the King-Dallas	Delete pledge

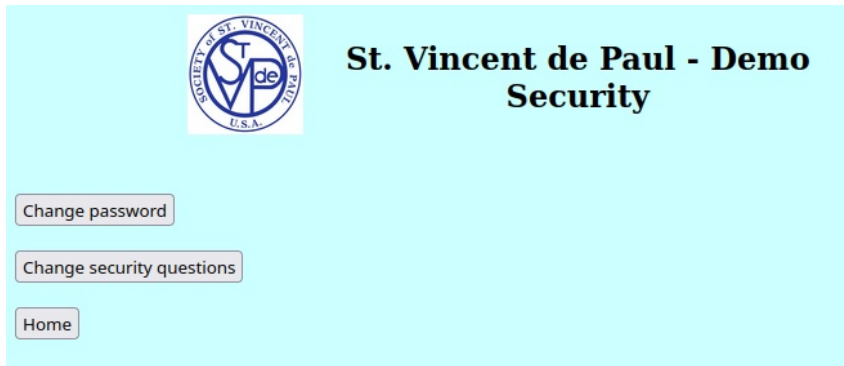
Payment instructions:

Send check to All Saints

[Home](#)

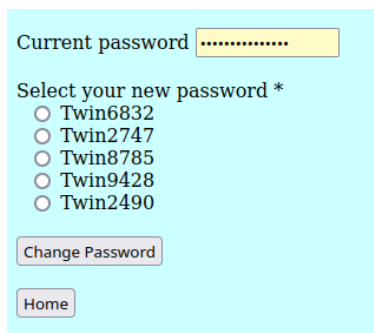
Security options

Clicking on the Security button displays the following:



The image shows a web page titled "St. Vincent de Paul - Demo Security". In the top left corner is a circular logo with the letters "St de" in the center, surrounded by the text "SOCIETY OF ST. VINCENT DE PAUL" and "U.S.A." at the bottom. Below the logo, there are three buttons: "Change password", "Change security questions", and "Home".

Clicking on Change password displays the following:



The image shows a form for changing a password. It has a label "Current password" followed by a yellow box containing ten dots. Below this is the label "Select your new password *" followed by a list of five radio button options: "Twin6832", "Twin2747", "Twin8785", "Twin9428", and "Twin2490". At the bottom of the form are two buttons: "Change Password" and "Home".

The user needs to enter the current password and select from the list for a new password.

Clicking on the Change security button will display the security question as displayed on the next page.

The first time a president or treasurer logs in, a list three security questions and answers must be provided to improve security and give the option of logging in even if the password is forgotten. Clicking on the option “Change security questions” allows the user to update the security questions and answers.



The screenshot shows a web page titled "St. Vincent de Paul - Demo Security Questions". It features the organization's logo on the left. The main content area has a light blue background. Below the title, there is a message: "This will only take a few minutes and will help improve security. Select a different question then provide an answer, then click on Save answers." There are three questions, each with a dropdown menu and a text input field for the answer. The questions are: "Question 1: Name of your favorite Saint", "Question 2: Name of your hero", and "Question 3: Name of your best childhood friend". At the bottom, there are two buttons: "Save answers" and "Home".

St. Vincent de Paul - Demo Security Questions

This will only take a few minutes and will help improve security.
Select a different question then provide an answer, then click on Save answers.

Question 1:

Answer 1:

Question 2:

Answer 2:

Question 3:

Answer 3:

Clicking on “Forgot my password” displays the 3 security questions and a new password that can be selected:



The screenshot shows a web page titled "St. Vincent de Paul - Demo Forgot password". It features the organization's logo on the left. The main content area has a light blue background. Below the title, there are three security questions, each with a text input field for the answer. The questions are: "Security question 1: Name of your favorite Saint", "Security question 2: Name of your hero", and "Security question 3: Name of your best childhood friend". Below the questions, there is a section titled "Select your new password *" with five radio button options: "Twin8173", "Twin1325", "Twin8290", "Twin7948", and "Twin6797". At the bottom, there is a button labeled "Set password".

St. Vincent de Paul - Demo Forgot password

Security question 1:

Answer 1:

Security question 2:

Answer 2:

Security question 3:

Answer 3:

Select your new password *

☐ Twin8173

☐ Twin1325

☐ Twin8290

☐ Twin7948

☐ Twin6797

Enter the answers to the three security questions, and selecting a new password will result in changing the password. If the user fails to answer the 3 security questions 3 times, the account is locked and an admin will be required to unlock it.

Login Problems

If the password is not correct, the following message is displayed:

The password is not correct.

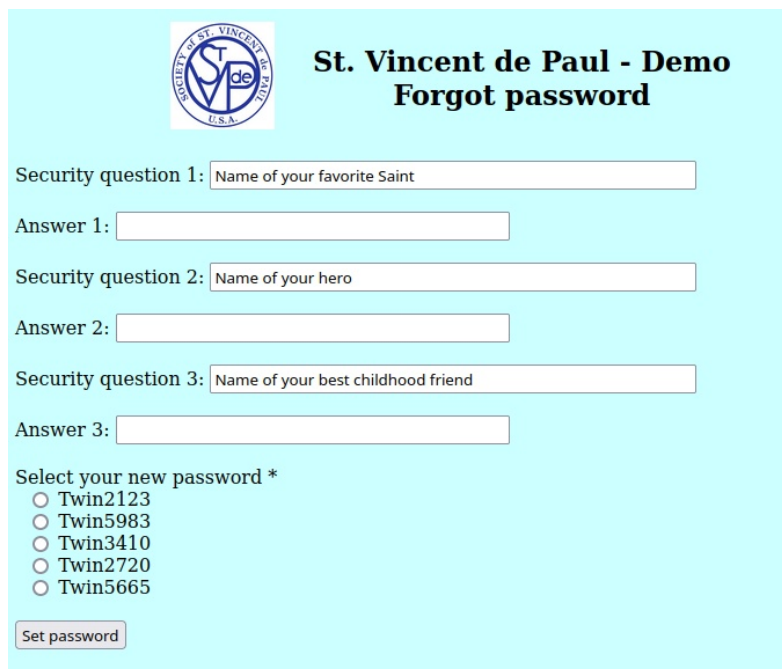
Select back arrow to continue.

The user can try 3 times to enter the correct password. If the user fails, the following message is displayed:



The screenshot shows a light blue rectangular box. In the top left corner is the St. Vincent de Paul U.S.A. logo. To its right, the text 'St. Vincent de Paul - Demo' is in bold, with 'Account Locked' below it in a larger bold font. Below this, a message reads: 'For security reasons, your account has been locked due to too many failed login attempts. Please enter your email address and click on Recover'. Underneath is a text input field labeled 'Email address:' and a button labeled 'Recover'.


Entering the correct email address and clicking on Recover displays the following:



The screenshot shows a light blue rectangular box. In the top left corner is the St. Vincent de Paul U.S.A. logo. To its right, the text 'St. Vincent de Paul - Demo' is in bold, with 'Forgot password' below it in a larger bold font. Below this, there are three security questions, each with a text input field: 'Security question 1: Name of your favorite Saint', 'Security question 2: Name of your hero', and 'Security question 3: Name of your best childhood friend'. Each question is followed by an 'Answer' label and a text input field. Below the answers, the text 'Select your new password *' is followed by five radio button options: 'Twin2123', 'Twin5983', 'Twin3410', 'Twin2720', and 'Twin5665'. At the bottom left is a button labeled 'Set password'.

Entering the correct answers and selecting a new password will reset the password and log in the user.

The user can try 3 times to enter the correct answers before the account will be permanently locked and the following message displayed.



St. Vincent de Paul - Demo Account Locked

For security reasons, your account has been locked due to too many failed login attempts.
To unlock your account, please contact a support person.

[Contact support](#) via email at Support@ParishPlus.com

If the user enters the wrong email address the following message will be displayed:

Invalid email address. Please confirm you typed it correctly and try again.
Select back arrow to continue.

Help

Clicking on the Help button will display the following:

[Contact support](#) via email at Support@ParishPlus.com

To report an app failure:

Please send as much information as possible about what you were doing and the error you received. Screenshots are usually very helpful.

To report an organization change, the following information is needed:

Conference name
Action (Add or Delete)
Name and email address
Position (president or treasurer)

Example

Elizabeth Ann Seton
Add Dan Manack email@gmail.com president

Twinning tutorial

The twinning process is the following:

1. President or Treasurer logs in and edits the mailing address for the conference (one time task and can be modified if necessary). A twinning request can not be added without the definition of the mailing address and can only be added by a conference President.

2. The President clicks on Add Twin Request and fills in the required fields. Clicking on Add Request results in adding a new twinning request and sends an email notification to all the conference presidents. The notification consists of a web address for the added twinning request. Clicking on the web address will display the new twinning request.

3. Clicking on the web address displays the need information, the request amount, balance, and who has pledged so far. Also included is a pledge button and a pledge amount field, and a "Send Request to me" button.

4. A President receiving the twinning request can click on the request to see if it should be considered further. If so, clicking on the "Send Request to me" button will send the details of the request to the President via email which can be forwarded to whoever is required for the process of making a pledge.

5. If the conference decides to pledge, filling in the pledge amount and clicking on the Pledge button will result in a new balance, and an email is sent to the person who pledged with the pledge details and the mailing address.

6. When the balance goes to zero, the pledge button is no longer displayed. The status of the request is changed from Active to Complete, and The President and treasurer(s) of the requesting conference will be sent an email notification that the balance is zero.

To use the Search Requests function, enter one or more characters (a string), and press the Enter key. If the string is found in any request record, those request records will be displayed. If the string is not found, a message will be displayed.

If a twinning request needs to be canceled, the requesting conference needs to contact any pledging conferences to resolve what to do with any checks already mailed.

If a pledge has been made and as a result the twinning request balance is zero and a pledging conference needs to delete their pledge, communication with the requesting conference is required to determine how best to clean up the mess. The requesting conference may need to change the status from Complete to Active.

If a pledge has been made and the twinning request balance is not zero, nothing else is required except to delete the pledge.

[Home](#)

Thank you Message

A conference President can send a thank you note to the Presidents of those conferences who have made pledges to a request. The "Send thank you" button is displayed after the pledge section only if:

1. Person logged in is President or Acting President of the conference that made the request.
2. Thank you has not already been sent.
3. Status of the request is "Complete".
4. Thank you option is enabled for the council.

When a request is Complete, the button "Send thank you" will be displayed. Clicking on that button will send email to each President of a conference that made a pledge.

A confirmation message is displayed that indicates how many emails have been sent. This number should be the same as the number of conferences that made pledges.

Would result in the following message assuming that Bob is the president of a conference that pledged \$200 and Dan is the president of the requesting conference.

Bob,

Thank you for your conference's pledge of \$200.

Dan

After thank you email has been sent, the date that it was sent and the message are displayed only for the President of the conference that issued the request.

Pledges

Date	Amount	Conference	Delete
03/05/2023	500	St. Elizabeth Ann Seton-Plano	Delete pledge

Thank you was sent on 03/05/2023

Thank you note:

~fname,

Thank you for your pledge of ~pledge.

Dan