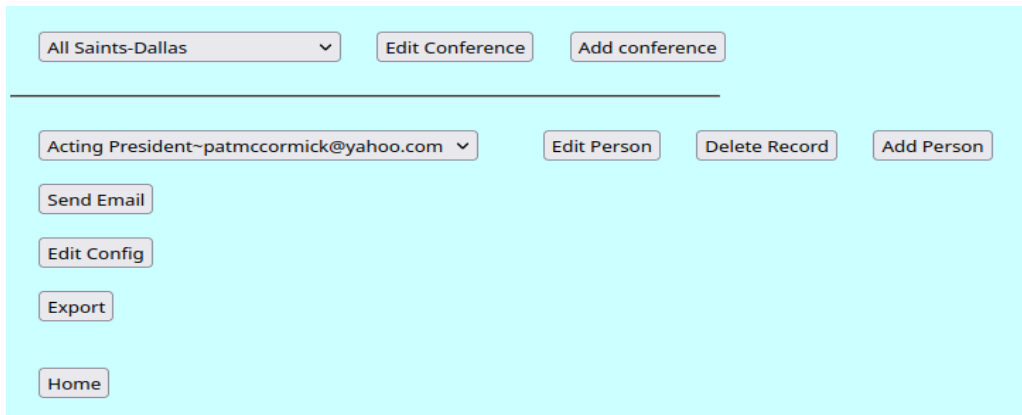


## Easy Twin Tutorial for Admin or Staff

This document shows the various functions that are available to a person with Council Admin or Council Staff roles. An additional button is displayed for Admin or Staff: “Admin Functions”. Staff has access to a proper subset of the “Admin” functions.

A person with a role of Admin will see the following display when they click on the “Admin Functions” button. In addition to these functions, the Admin can edit any twinning request or delete any pledge.

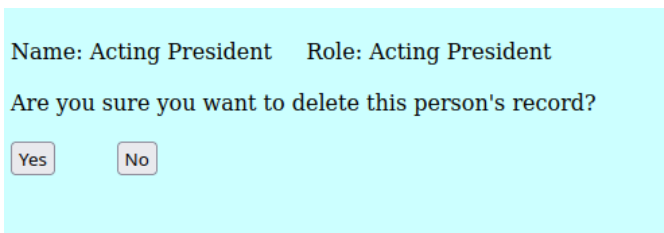


The screenshot displays a light blue interface with several management buttons. At the top, there is a dropdown menu showing "All Saints-Dallas" with a downward arrow, followed by "Edit Conference" and "Add conference" buttons. Below these, a horizontal line separates the top section from the main content area. In the main area, there is a dropdown menu showing "Acting President~patmccormick@yahoo.com" with a downward arrow, followed by "Edit Person", "Delete Record", and "Add Person" buttons. Below these are "Send Email", "Edit Config", "Export", and "Home" buttons, each on its own line.

Click on Add conference to add a new conference. Select the conference from the drop down, and click on “Edit Conference” to make changes.

Click on Add Person to add a new member. Select a member from the drop down and click on “Edit Person” to make changes or “Delete Record” to delete that record.

Clicking on Delete Record will display a confirmation page:



The screenshot shows a light blue confirmation page. At the top, it displays "Name: Acting President" and "Role: Acting President". Below this, it asks "Are you sure you want to delete this person's record?". At the bottom, there are two buttons: "Yes" and "No".

The other options are documented on the following pages.

## Send email

The Send Email function is used to send email to the members who have access to the twinning database. Each member receives an individual email, so this function is used to send the initial password to each member. It can also be used to send other messages as the database is normally current with respect to email addresses and roles.

An Admin or Staff person would normally compose the message and sent it only to “Myself” to make sure the email is correct. The back arrow can be used to then select the roles that the email needs to be sent to. Select the roles then click on the “Send email” button.

The message is a template and is modified for each email.

~name replaced by the full name

~fname is replaced by the first name

~date is replaced by the current date

~email is replaced by the email addresses

~password is replaced by the password.

☐ Presidents and Acting Presidents  
☐ District Presidents  
☐ Treasurers  
☐ Viewers  
☐ Myself

Subject \*

Message \*

~name ~fname ~date ~email ~password can be used in message.

Send email

Home

## Edit Config

Clicking on Edit Config will display the configuration parameters for the council. Changing any setting will have a major impact on how the app works so be careful.



**St. Vincent de Paul - Demo Edit Config**

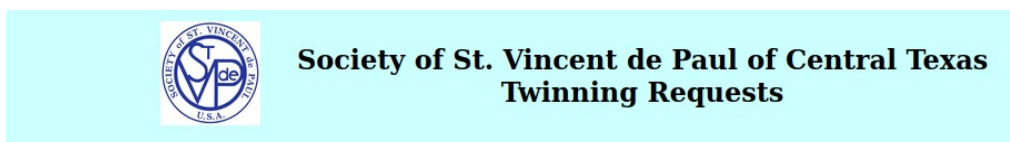
Gen date: 08/20/2022  
Last updated: 03/05/2023

```
header=St. Vincent de Paul - Demo
cookie=SVdP_Demo
support_email=Support@ParishPlus.com
council_email=Support@ParishPlus.com
phone=Yes
name/address=Yes
notify=Yes
need by date=No
auto complete=No
email=Yes
process name=Co_Pay
thank you=Yes
notify DP=Yes
```

[Update Config](#)

[Home](#)

Header is what shows up on each page displayed. The header line for Austin is: header=Society of St. Vincent de Paul of Central Texas. The displayed header looks like this:



Cookie is the name of the cookie that is used. Changing the cookie name will require that all members log in again.

Support email is the email address of the person providing support for the twinning app. Council email is the email address of the person(s) who need to be informed when a significant personnel change is made to the conference. The council is automatically informed when a President or Treasurer is added or deleted if the email address is defined.

For the remaining parameters the option is “Yes” or anything else is taken as “No”. Phone determines if the phone number field is used. If phone=No, the phone field is not displayed.

name/address determines if the neighbor/address field is used. This should always be “yes”.

notify determines if a person has the option of not receiving email.

Need by date determines if that field is used.

Auto complete determines if a request is marked as Complete if the date is greater than or equal to the need by date. If there is no "need by date" or "need by date" is not "Yes", auto complete is ignored. If the status of a request is "Active" and auto complete is yes and the date is greater than the need by date, the status is changed to "Complete"

Email determines if any email is enabled. Used in the Demo database to disable email.

process name is Co-Pay or Twinning

thank you=Yes enables sending thank you notes.

notify DP=Yes - The District President of the conference that added a request is included in the notification that a new request has been added.

Export

An easy way to see the data in the database is to click on "Export". Four tables are displayed.

Conference

Person

Request

Pledge

Each table can be selected, copied, then pasted into Excel if there is some reason to process the data.

Example pledge table.

Record Type	Request Record ID	Pledge Date	Pledged By	Conference	Pledge Amount
Pledge	5	11/07/2022	Seton President	St. Elizabeth Ann Seton-Plano	200
Pledge	3	11/07/2022	Seton President	St. Elizabeth Ann Seton-Plano	200
Pledge	1	11/07/2022	Seton President	St. Elizabeth Ann Seton-Plano	100
Pledge	3	12/11/2022	Seton President	St. Elizabeth Ann Seton-Plano	100
Pledge	5	12/26/2022	Seton President	St. Elizabeth Ann Seton-Plano	51

The admin function for a person with Staff role is a proper subset. They can not edit any request or delete any pledge, but they can add or edit a conference and add or edit a person record.

All Saints-Dallas

Edit Conference

Add conference

Acting President~patmccormick@yahoo.com

Edit Person

Delete Record

Add Person

Send Email

Export

Home

The Staff person can not see or change the config field (the council parameters).

There is another level of admin – System Admin. Only two people have access to that level and it includes an additional button: “Manage”.

The additional functions in Manage include the following:

Add Council

Request Summary

Display / Edit council parameters.

Import – import conference and people data from spreadsheets.


Welcome System Admin. Today is March 17, 2023.

[Add Council](#) [Request Summary](#) [Home](#)

Name	Rec ID	Gen_date	Last Update	Parameters
<a href="#">Austin</a>	6	11/07/2022	03/10/2023	header=Society of St. Vincent de Paul of Central Texas cookie=SVdP_Austin support email=stacey.sherman@ssvdp.org council email=stacey.sherman@ssvdp.org phone=Yes name/address=Yes notify=Yes need by date=No auto complete=No email=Yes process name=Twinning thank you=Yes notify DP=Yes
<a href="#">Demo</a>	1	08/20/2022	03/05/2023	header=St. Vincent de Paul - Demo cookie=SVdP_Demo support email=Support@ParishPlus.com council email=Support@ParishPlus.com phone=Yes name/address=Yes notify=Yes need by date=No auto complete=No email=Yes process name=Co_Pay thank you=Yes notify DP=Yes

Clicking on Add Council brings up a council parameter record in edit mode. Entering the council parameters and clicking on Add council is all that is required to add an addition council to the app.

Clicking on the name of a council displays the council parameters in edit mode.



## St. Vincent de Paul - North Texas Edit Council

Record number: 1  
Gen Date: 08/20/2022  
Last Update: 03/05/2023

Council:

```
header=St. Vincent de Paul - Demo
cookie=SVdP_Demo
support_email=Support@ParishPlus.com
council_email=Support@ParishPlus.com
phone=Yes
name/address=Yes
notify=Yes
need by date=No
auto complete=No
email=Yes
process name=Co_Pay
thank you=Yes
notify DP=Yes
```

Params:

[Save changes](#)

[Manage](#)

[Home](#)

Clicking on the Request Summary displays the 5 most recent twinning requests.

Council Demo					
Request Number	Status	Request Date	Requested Amount	Remaining Balance	Conference
7	Complete	03/06/2023	500	0	St. Elizabeth Ann Seton-Plano
6	Complete	02/20/2023	500	0	St. Elizabeth Ann Seton-Plano
5	Active	11/09/2022	1000	850	St. Elizabeth Ann Seton-Plano
4	Complete	11/04/2022	700	449	Christ The King-Dallas
3	Complete	11/04/2022	600	600	Christ The King-Dallas

Clicking on Home returns from the System Admin functions to the Home display of the app.

The import function creates conference and people records from data in spreadsheets. This is the most efficient way for a new council to start using the app.

Row 1, col. 1 must contain Record Type

Following Rows must contain:

Col. 1 Conference or Person

for Conference:

Col. 2 - conference name

Col. 3 - status (Active)

Col. 4 - district

For People:

Col. 2 – name (Tom Jones)

Col. 3 – conference (needs to match a conference name)

Col. 4 – role (President, Treasurer, or Viewer)

Col. 5 – email address

Col. 6 – phone number