ONLINE RETURN VISIT/BIBLE STUDY BOOK

Creating an online bible study/return visit book is very useful. It prevents householders from being over worked. In addition, all the notes that you entered into the system will be transferred to another individual if the householder is no longer interested or if you have to transfer this call to another publisher (i.e. a brother has a female return visit and he would like to give this call to a sister). Listed below is a step-by-step pictorial tutorial that will show you how to create and update an online RVs/Bible Studies list and also transfer the RVs/Bible Studies to another publisher.

STEP 1: ACCESS THE WEBSITE

Open your preferred web browser, type the following web address into the address bar: www.onlineterritorymanager.com. Once the page loads onto the browser, you will notice a place for you to enter your Login Name and Password as shown in the following image:

Enter the username and password you were given by your territory servant and then click the “Login” button.

STEP 2: CREATING AN ONLINE RETURN VISIT/BIBLE STUDY BOOK

Creating an online bible study/return visit book involves simply adding the address to the “My RVs and Bible Studies” list. To add an address to your list, you will first find them in the “Custom Territory Check Out list” Hover (do not click) your mouse over the words “Territory Check Out”, a submenu should appear. Select the “Custom Territory Check Out”, as illustrated in the image below:

STEP 3: FINDING YOUR RETURN VISITS/BIBLE STUDIES

There are two ways to search for your RVs/Bible Studies: 1) Map Search – List addresses based on a set area; 2) Criteria Search – List addresses based on one or more criteria; 3) Combined Method – List address based on a set area and one or more criteria.

METHOD 1: MAP SEARCH

Click on the button to access the map search features. Once the page loads onto the browser, you will notice a set of buttons and a map. Follow the numbered instructions in setting up a map area to search.

Once you have clicked on “Save Map” you will be return to the “Custom Territory Search” Table, simply click on the “Search” button in the “Custom Territory Search” Table.
In the Custom Territory Search Table, use one or more of the criteria to locate the householder’s address. Suggestion: try not to be too vague or the system will return a large number of addresses. The explanations of the criteria are as described below:

**Territory:**
Select the territory # where the householder is located.

**Bus/Res:**
Select what type of address you are searching: Business, Resident, or Both

**Map Page #:**
If your Territory Servant uses this field, enter the Thomas Guide Page # where the addresses are located.

**Map Grid:**
If your Territory Servant uses this field, enter the grid that corresponds to the Thomas Guide.

**City/Province:**
Enter the City/Province where the addresses you are looking for are located.

**Zip Code:**
Enter the Zip Code where the addresses you are looking for are located.

**Street Name:**
Enter the Street Name where the addresses you are looking for are located. [Note: Partial input allowed]

**Contact Name:**
Enter the name of the household you are looking searching. Note: name must match what is in the system. [Note: Partial input allowed]

**Notes:**
Enter any notes that might have been previously entered into the Notes field. [Note: Partial input allowed]

**Sort By:**
Returns the list sorted by these options: Name, Address, Zip, Phone Number, or Map Coordinates, by default Address is selected.

**Check Boxes:**
Check the boxes to enable these additional search criteria: Records Not Worked (Addresses have not been worked before), Records Worked (Addresses have been worked before), Locked Gate or Dog (Addresses have either a Locked Gate or Dog), Confirmed *Language* Speaker (Confirmed that they speak the language your group is responsible for; [*Language* - will be replaced by your groups primary language]), Do Not Calls (List any Do Not Calls)

Once you have finish entering one or more of the above criteria, click on search. You will receive a list of addresses that match the criteria you have set.

The addresses that you can move to your RVs/Bible Studies list have a check box, simply put a check mark in the box. If the addresses you want to add to your RVs/Bible Studies list have a “-” instead of the check box, then you will have to wait till the territory has been checked in to add it to your list. One you have checked the available addresses, click on Next to return to the custom “Custom Territory Search” page. If you add the wrong address to your “Custom Address Search Bucket,” simply place a check in the check box next to the address and then click on “Remove from Bucket.”

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**STEP 4: SAVING ADDRESSES TO YOUR RETURN VISITS/BIBLE STUDIES LIST**

The addresses that you checked will be listed in the “Custom Address Search Bucket.” You can continue to add more addresses to the bucket by repeating the directions listed in Step 3. Once you have finished adding your RVs/Bible Studies to the “Custom Address Search Bucket,” you will need to save it to your “RVs and Bible Studies” list. Place a check in the check box next to each address, and then click on the “Save to RV & BBS!” button.

When you click on the “Save to RV & BBS!” button, you will be transferred to the following page where all of your RVs/Bible Studies will be listed:

**STEP 5: ACCESSING YOUR RETURN VISITS/BIBLE STUDIES**

The system will keep all your RVs/Bible Studies in the “My Return Visits and Bible Studies” page. To access this page, simply hover (do not click) your mouse over the words “My Territories”, a submenu should appear. Select the “My Return Visits and Bible Studies”, as illustrated in the image below:

**STEP 6: MANAGING YOUR RETURN VISITS/BIBLE STUDIES**

On the “My Return Visits and Bible Studies” page, you will see a set of buttons. Each button provides a set task that will help you manage your RVs/Bible Studies. The set of manage options are: 1) **Edit** – You can change/update the basic contact info; 2) **Check-In** – You can check-in addresses that are no longer your RVs/Bible Studies; 3) **Print RV/BBS Lists with Notes** – You can print a hard copy of all your Notes for your records; 4) **Update Last Worked Date** – You enter the date when you last worked the RV/Bible Studies; 5) **Call History** – You can add, edit, or delete any call history to your RVs/Bible Studies; 6) **Print Slip** – You can print a hard copy for use in your RVs/Bible Studies book.
MANAGE 1: EDIT

To edit an address, simply place a check in the check box and then click on the Edit button. Once you click on the Edit button you will be redirected to the following webpage:

Once you are finish making all necessary changes, simply click on the Update button to finalize your changes and you will return to the “My Return Visits and Bible Studies” page. If you would like to abandon or return to the “My Return Visits and Bible Studies” page, simply click on Cancel button.

MANAGE 2: CHECK-IN

Once an address is no longer your RV/Bible Study, please check the address in so that it can be worked when the territory it resides in is worked. To check-in addresses that are no longer your RV/Bible Study, simply place a check in the check box and then click on the Check-In button. Once you click on the Check-In button, the “My Return Visits and Bible Studies” page will reload with the address you selected removed. If you made a mistake, you must search for and add the address again (See Steps 3 and 4).

MANAGE 3: PRINT RV/BBS LISTS WITH NOTES

The system allows you to manage a list of RVs/Bible Studies that you are planning to visit out in the ministry. You can create this list, by clicking on the check boxes next to the addresses you would like to visit and then simply click on the “Print RV/BBS Lists with Notes” button. You will be given a list of addresses and Call History notes that you or another publisher has entered. You can sort the list by clicking on any of the blue colored column headings such as Contact Name, Address, Zip, Phone, or Map Coord. An example is shown in the following image:
MANAGE 4: UPDATE LAST WORKED DATE

This option puts a date in the Last Worked field. This is useful in situations where you want to quickly see which RVs/Bible Studies you have not visited recently. Once you have added a Last Worked date to an RV/Bible Study, it will be displayed on the “My Return Visits and Bible Studies” page as illustrated in the following image:

MANAGE 5: CALL HISTORY

Clicking on the icon will take you to the Call History page as shown in the image below:

This page will allow you to 1) Add, 2) Edit, and 3) Delete any call history that is attached to the address. If this was a previous call of another publisher, the history that they entered will be listed here with the most current listed first.

HISTORY 1: ADDING CALL HISTORY

To add a call history record to the address, simply click on the Add button and you will be directed to the following webpage:

Visit Date: Enter the date, in the form of 2-digit Month, 2-digit day, and 4-digit year, that you visited the householder.
Visit Day/Time: Enter the day of the week and the time of the day that you visited the householder.
Placement: Enter the placement that you left with the householder during this visit.
Householder: Enter the householder’s name in this field. This is useful if you met other members of the family.
Publisher: Enter the publisher name who visited the householder in this field. [Default: The publisher who RV/Bible Study this belong to will be inputted automatically by the system.]
Notes: Enter any notes that you would like to enter into the Notes field.

Once you have finished filling up the Call History Form, simply click on Update to add the Call History to the address.
HISTORY 2: EDITING A CALL HISTORY

To edit a call history, place a check in the checkbox next to the call history you would like to edit, and then simply click on the Edit button and you will be taken to a page that looks exactly like the add page, except the fields are filled in. Simply make the changes to each field as desired. Once you are finished click on the Update button to finalize the changes. If you would like to return to the “Call History” page or cancel the edit process, simply click on the Cancel button.

Call History for 3456 Drive

Current History...

<table>
<thead>
<tr>
<th>Select</th>
<th>Visit Date</th>
<th>Visit Day/Time</th>
<th>Placement</th>
<th>Householder</th>
<th>Publisher</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>12/07/2009</td>
<td>MON</td>
<td>Brochure</td>
<td>John</td>
<td>Training Purposes</td>
<td>Was Interested in what happens to dead love ones.</td>
</tr>
</tbody>
</table>

Add  Edit  Delete

Go Back To RV's & BBS's

HISTORY 3: DELETE A CALL HISTORY

To delete a call history, place a check in the checkbox next to the call history you would like to delete, and then simply click on the Delete button. The call history will be removed and you will be returned to the “Call History” page.

MANAGE 6: PRINT SLIP

Clicking on the icon will pop-up another webpage with a print slip that contains your call history and RV address, as shown in the following image:

You can print this out for your RV book.