



















Auto Create Connection Requests for New People

If it is a high priority at your church to personally reach out to each new person who connects with your church. This recipe will show how to set up the framework in Connection Requests to know who these people are and move them into the connection process.

It is great to know how a person first connects with the church, in other words “how their profile was created.” This is a big help when reaching out to them. [Georgeanne Bell](#) with [Pillars](#) shared an awesome recipe [‘Track How Person Records are Created’](#) which creates an attribute that lives on the person’s profile and can be used for reference. I recommend setting this up prior to moving forward here.

Set up Connections

1. In Connections, create a Connection Type called New to “Church Name”. It is important here to define a process flow using the statuses to help Connectors. Below is how ours are set up, we printed this out for our Connectors and created a flowchart as well.

Statuses				
	Name	Description	Is Default	Is Critical
☰	Unassigned	Unassigned - Needs to be assigned.	✓	 
☰	Assigned	Assigned -Connector assigned but no action taken. First connection attempt should be made in alignment with timeline for How Created.		 
☰	No Response 1	No Response 1 - Connector has attempted to contact new person within appropriate time frame dependent upon How Created but received no response.		 
☰	No Response 2	No Response 2 - Connector has attempted to contact new person within 7-14 days but received no response.		 
☰	No Contact	Connector has attempted to contact person 3 times without any response.		 
☰	Follow Up	Follow Up - Connector has made contact with the new person and wants to contact them again. Choose time for future follow up in State of Connection Request.		 
☰	Not Ready	Not Ready - New person is currently not ready to take the next step in further connection. Set Future Follow-Up for 3-6 months.		 
☰	Not Interested	Not Interested - New person is not interested in getting further connected at this time, or person has not responded after 3 contact attempts.		 
☰	Engaged	Engaged - New person has taken the next step to further connection at TFC.		 

2. Add a Connection Opportunity called ‘New People’ to the New to “Church Name” Connection Type.
3. Create Connector Group of desired Connectors and add to New People Connection Opportunity.
4. Create desired Placement Groups for Next Steps that New People would have the opportunity to take. Add the Placement Groups to New People Connection Opportunity.

Create Data View & Group

1. Create a data view called Group Sync to New People with filters for the desired record created date/time range and age of the person (a filter can be added to exclude any Connection Status or How Created attributes as well):

The screenshot shows the 'Edit Data View' interface. At the top, the 'Name' field is set to 'Group Sync: New Families to TFC'. The 'Description' field is empty. The 'Applies To' dropdown is set to 'Person'. The 'Post-filter Transformation' dropdown is set to 'Connection DVs'. The 'Category' dropdown is set to 'Connection DVs'. The 'Include Deceased' checkbox is unchecked. The 'Speed Settings' section has 'Enable Persistence' checked. Below these settings, there are three filter groups. The first filter group is titled 'Show if Any All of these are false true' and contains two filters: 'Created Date Time' with a range from '8/3/2021 12:00 AM' to '8/3/2021 11:59 PM'. The second filter group is titled 'Show if Any All of these are false true' and contains two filters: 'Created Date Time' with a range from '7/29/2021 12:00 AM' to '8/2/2021 11:59 PM'. The third filter group is titled 'Show if Any All of these are false true' and contains two filters: 'Age Greater Than Or Equal To 12' and 'Age Is Blank'. At the bottom, there are 'Save', 'Cancel', and 'Preview' buttons.

2. Create a group called New People to “Church Name”.
3. Add data view from #1 to sync to New People to “Church Name” group.
 - You will want a pretty short Sync Interval – 15 minutes.

Group Workflow to Add Connection Request

1. This workflow is part of the zip file you can download with this recipe
2. Import the Add Connection Request to New People workflow.
3. The Connection Op Type attribute in the workflow will need to be set to the Connection Opportunity of New People created above.
4. Add this workflow as a Group Member Workflow to the group New People to “Church Name” created above.

Workflow to Notify Connectors of a Connection Request Assignment

1. This workflow is part of the zip file you can download with this recipe
2. Import the Notify Connectors of Assignment workflow.
3. Check the Email Body action to confirm your Rock site url is correct you will probably need to update the page number for your site.
4. Add this workflow as a Workflow on the Connection Opportunity New People created above.

This Notify Connectors of Assignment workflow can be added to any Connection Opportunity where a connector needs to be alerted.