

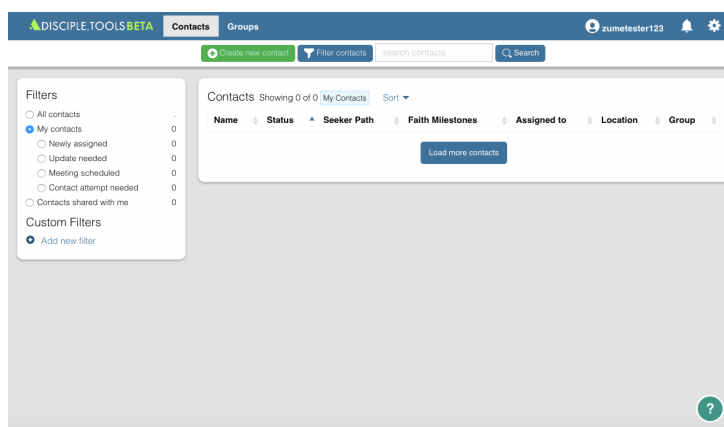
## **Zúme and Disciple.Tools Integration** **Guide for Coaches**

<b>Accessing Disciple.Tools</b>	<b>2</b>
<b>Logging In Directions:</b>	<b>2</b>
<b>Adding Your County/Region</b>	<b>3</b>
<b>Disciple.Tools Manual</b>	<b>4</b>
<b>Contacts List Page</b>	<b>4</b>
<b>Contact Record Page</b>	<b>9</b>
<b>Groups List Page</b>	<b>14</b>
<b>Group Record Page</b>	<b>15</b>
<b>Interactive Tutorial</b>	<b>18</b>

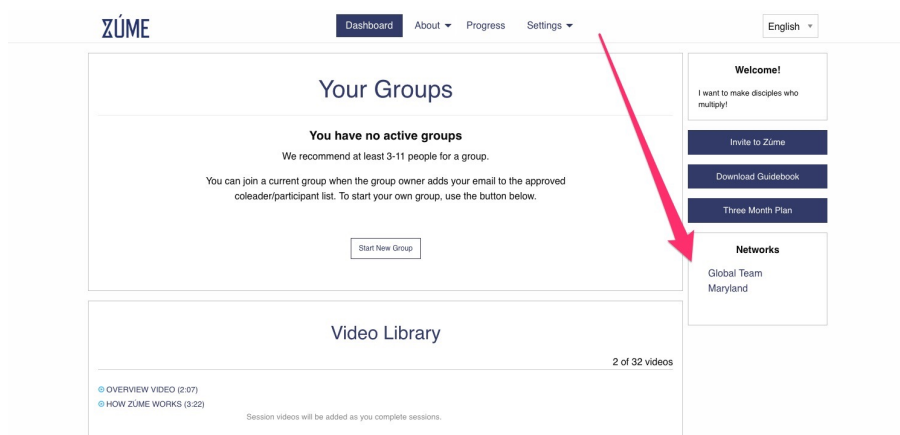
# Accessing Disciple.Tools

## Logging In Directions:


1. Open the email invitation to join Zúme Disciple.Tools as the role of **Multiplier**
2. Click the confirmation link (the second link listed) to confirm your account.
3. This will open Zúme Disciple.Tools. Click “Log in”
4. If it doesn’t automatically log you in, use your [zumeproject.com](http://zumeproject.com) username and password.
5. After logging in, you will arrive to the **Contacts List Page** that looks like this:



**Note:** Once you are added as a Coach in Disciple.Tools, you will be able to access contacts assigned to you by going to your Zúme Dashboard. Click on the Network name found under the **Networks** section on the right. No additional login will be necessary.



## Adding Your County/Region

1. Click the gears icon  in the upper right hand corner and select **Settings**
2. In the **Your Profile** section, click “Edit”
3. Change your **nickname** to your name and the county/region that you are overseeing in parenthesis  
Example: John Smith (Calvert)
4. Scroll down and click “Save”
5. Return to the **Contacts List Page** by clicking “Contacts.” At first, you will not have any contacts listed.

# Disciple.Tools Manual

## Contacts List Page

This is the **Contacts List Page**. It is currently blank because you have not been assigned any contacts. When you are assigned a new contact or group, you will see them listed here. You will also see here any contacts that you have added personally.

The screenshot shows the Disciple.Tools interface for the Contacts List Page. The page is currently blank, indicating no contacts are assigned. The interface includes a top navigation bar, a toolbar, a filters sidebar, and a main content area with a table header and a 'Load more contacts' button.

**1. Website Menu Bar**: Located at the top left, it displays the Disciple.Tools logo and the word 'BETA'. The 'Contacts' tab is active, and the 'Groups' tab is also visible.

**2. Contacts List Toolbar**: Located below the navigation bar, it contains a 'Create new contact' button, a 'Filter contacts' button, a search input field labeled 'search contacts', and a 'Search' button.

**3. Filters Tile**: Located on the left side, it contains a 'Filters' section with radio buttons for 'All contacts', 'My contacts', 'Newly assigned', 'Update needed', 'Meeting scheduled', 'Contact attempt needed', and 'Contacts shared with me'. Below this is a 'Custom Filters' section with an 'Add new filter' button.

**4. Contacts List Tile**: Located in the main content area, it shows 'Contacts Showing 0 of 0 My Contacts' and a 'Sort' dropdown. Below this is a table header with columns: 'Name', 'Status', 'Seeker Path', 'Faith Milestones', 'Assigned to', 'Location', and 'Group'. A 'Load more contacts' button is positioned below the table header.

This page consists of four main sections.

1. Website Menu Bar
2. Contacts List Toolbar
3. Filters Tile
4. Contacts List Tile

## 1. Website Menu Bar

The **Website Menu Bar** will remain at the top of every page of Disciple.Tools.



### Disciple.Tools Beta Logo

Disciple.Tools has not been publicly released. Beta means that this software is still in development and is rapidly evolving. Expect to see changes. We ask for your grace and patience as you utilize this software.

### Contacts

By clicking this, you will arrive to the **Contacts List Page**.

### Groups

This will take you to the **Groups List Page**.

### User

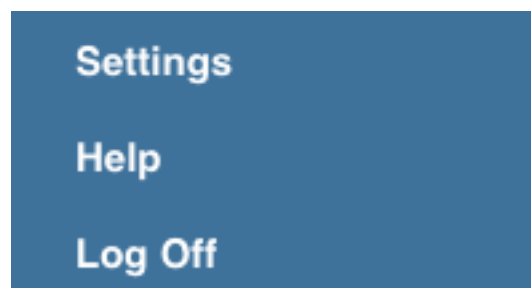
Your name or username will show up here so you will know that you are correctly logged into your account.

### Notification Bell

Anytime you receive a notification, a small red number will display here to inform you of the number of new notifications you have. You can edit the type of notifications you want to receive under **Settings**.

### Settings Gear

By clicking on the settings gear, you will be able to do one of three things:



**Settings:** Change your personal profile information, your notification preferences, and your availability.

**Help:** View the [Disciple.Tools' Documentation How To Guide](#)

**Log Off:** Log out of Disciple.Tools completely. If you click on this you will have to log in again using your email and password.

## 2. Contacts List Toolbar



### Create new contact



This button allows you to add a new contact record to Disciple.Tools. Other multipliers can't see contacts you add, but other users can such as the Zúme admins and the Dispatcher (the one responsible for assigning new contacts to be coached). Learn more about the Disciple.Tools roles and their varying permission levels by [clicking here](#).

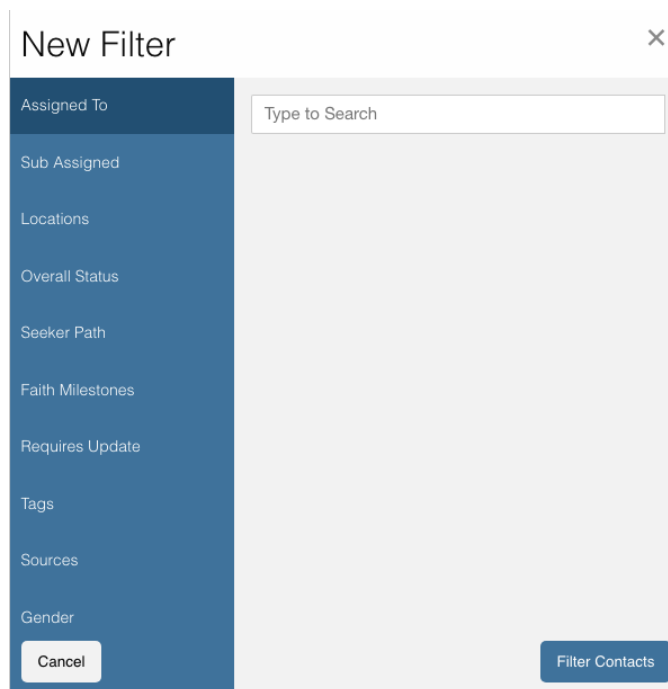
Note: Disciple.Tools values the security and safety of all users and contacts.

### Filter contacts

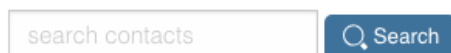


After a while, you may end up with a pretty long list of contacts all progressing at different points. You will want to be able to filter and search for who you need quickly. By clicking this button, you will be able to arrange your contacts list per your preference.

To learn more about these filter options, [click here](#).



### Search



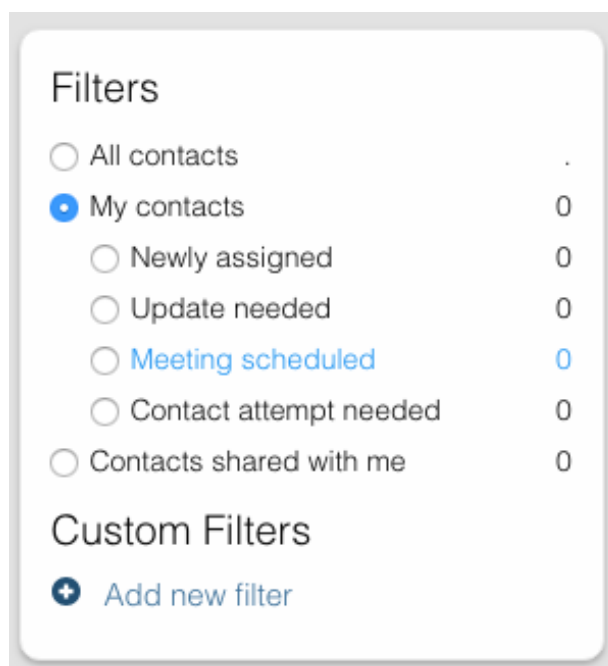
Type a contacts name here to quickly find them.

### 3. Filters Tile

## Filters

**All contacts:** You will be able to see all of your contacts and any contacts shared with you by another user here.

**My contacts:** These are all the contacts that have been assigned to or created by you. You are responsible for these contacts.



- **Newly assigned:** These are contacts who have been assigned to you but you have not accepted yet
- **Update needed:** These are contacts in need of an update about their progress so none fall through the cracks. This can be manually requested by a Dispatcher or automatically set based on time (e.g. No activity after 2 months).
- **Meeting scheduled:** These are all contacts with whom you have scheduled a meeting but have not yet met.
- **Contact attempt needed:** These are contacts who you have accepted but have not yet made the first attempt to contact them.

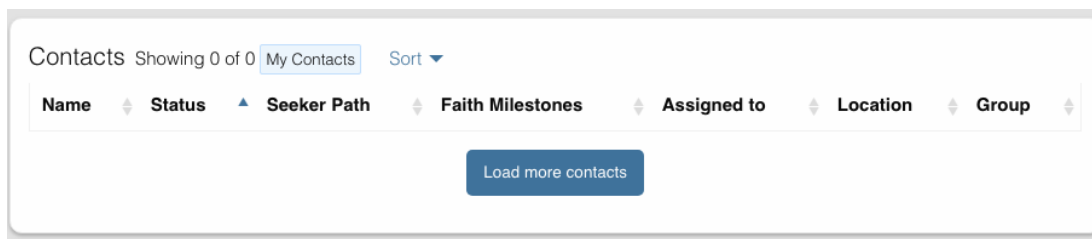
**Contacts Shared with me:** These are all contacts who other users have shared with you. You do not have responsibility for these contacts but you can access them and comment if needed.

## Custom Filters

This is where all of your custom filters will be saved. The **Add new filter** does the exact same thing as the blue **Filter contacts** button as mentioned in section 2 of the **Contacts List Page**. Not only can you filter contacts, you can save and name those customized filters to use for later use.

To learn more about how to add custom filters, [click here](#).

## 4. Contacts List Tile



## Contacts

Your list of contacts will show up here. Whenever you filter contacts, the list will also be changed in this section too. Below are fake contacts to give you an idea of what it will look like.

Contacts Showing 3 of 3 My Contacts Sort

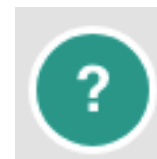
Name	Status	Seeker Path	Faith Milestones	Assigned to	Location	Group
Jessica Blue 555-5555	Assigned	Contact Attempt Needed		Isabel Arboleda (multiplier)	Madrid	
Saira Tabbal 0123849201	Active	First Meeting Complete	Has Bible	Isabel Arboleda (multiplier)	Catalonia	
Sara Qureshi 555-5555	Active	Contact Attempted		Isabel Arboleda (multiplier)	Catalonia	

[Load more contacts](#)

**Sort:** You can sort your contacts by newest, oldest, most recently modified, and least recently modified.

**Load more contacts:** If you have a long list of contacts they will not all load at once, so clicking this button will allow you to load more. This button will always be there even if you do not have any more contacts to load.

**Help Desk:** If you have an issue with the Disciple.Tools system, first try to find your answer in the [Documentation How to Guide](#) (found by clicking **Help** under **Settings**). If you can't find your answer there, click this question mark to submit a ticket about your issue. Please explain your issue with as much detail as possible.



Note: For additional information about the **Contacts Lists Page**, click [here](#)



# Contact Record Page

The screenshot shows the 'Contact Record Page' for a user named 'John'. The page is divided into several sections, each numbered 1 through 6:

- 1. Contact Record Toolbar:** Located at the top right, it includes a user profile icon for 'Testy Tester', a 'Following' status, and a 'Share' button.
- 2. Status and Assignment Tile:** Shows the contact's status as 'Active' and is assigned to 'Testy Tester'. It also includes a 'Sub-assigned to' field with a search box for multipliers and contacts.
- 3. Details Tiles:** A grid of information including:
  - Phone:** 555-5556
  - Email:** john@xyz.com
  - Social Media:** None set
  - Address:** No address set
  - Locations:** No location set
  - People Groups:** No people group set
  - Age:** No age set
  - Gender:** No gender set
  - Source:** personal
- 4. Comments and Activity Tile:** A section for writing comments and viewing activity. It includes a 'Quick actions' dropdown and a 'Submit comment' button. The activity log shows several actions by 'Testy Tester' such as 'Removed from group Group 5', 'Added to group Group 5', and 'Phone changed to: 555-5556'.
- 5. Connections Tile:** A section for managing connections, including 'Groups', 'Baptized By', 'Baptized', 'Coached By', and 'Coaching'. Each section has a search box for multipliers and contacts.
- 6. Progress Tile:** A section for tracking progress, including 'Seeker Path' (First Meeting Scheduled), 'Faith Milestones' (Has Bible, Reading Bible, States Belief), and 'Baptism Date'.

1. Contact Record Toolbar
2. Status and Assignment Tile
3. Details Tiles
4. Comments and Activity Tile
5. Connections Tile
6. Progress Tile

Additional: Other Tile and Zúme Info Tile

## 1. Contact Record Toolbar

**Follow** Follow

Following a contact means that you are actively receiving notifications about activity in their contact record. If you are assigned to a user, you must follow them. If you are sub-assigned or have been shared the contact, you can choose to follow or not follow the contact by toggling on or off the follow button

**Share** Share

Click the share button to share a contact record with another user.

## 2. Status and Assignment Tile

The screenshot shows a contact tile for 'John'. On the left is a profile icon and the name 'John'. To the right, there is a 'Status' section with a blue info icon and a green 'Active' button with a dropdown arrow. Further right is an 'Assigned to' section with a user icon, the text 'Assigned to', a search box containing 'zumetester123', and a dropdown arrow. On the far right is a 'Sub-assigned to' section with a user icon, the text 'Sub-assigned to', and a search box with the placeholder text 'Search multipliers and contacts'.

### Contact Name

The name of the contact will show up here. You can edit that in the **Details** section.

### Status

This describes the status of the contact in relationship to the Disciple.Tools system and multiplier.

**Unassigned:** The contact is new in the system and/or has not been assigned to someone.

**Assigned:** The contact has been assigned to someone, but has not yet been accepted by that person.

**Active:** The contact is progressing and/or continually being updated.

**Paused:** This contact is currently on hold (i.e. on vacation or not responding).

**Closed:** This contact has made it known that they no longer want to continue or you have decided not to continue with him/her.

**Unassignable:** There is not enough information to move forward with the contact at this time.

### Assigned to

This is the user assigned to the contact. They are the ones responsible for the contact and updating the contact's profile.

### Sub-assigned to:

This is someone working alongside of the main person assigned to the contact. You may find that you are partnering with others in your discipleship relationships. Only one person can be assigned while multiple people can be sub-assigned.

### 3. Details Tile

## Details

These are the details about a contact. You can change the information here by clicking “edit.”

Details
Edit

<p><b>Phone</b> 1920340213</p> <p><b>Address</b> No address set</p> <p><b>Age</b> No age set</p>	<p><b>Email</b> No email set</p> <p><b>Locations</b> Madrid</p> <p><b>Gender</b> No gender set</p>	<p><b>Social Media</b> None set</p> <p><b>People Groups</b> No people group set</p> <p><b>Source</b> Web</p>
--	--	--

### 4. Comments and Activity Tile

## Comments and Activity

This tile is where you will want to record important notes from meetings and conversations with a contact. Type @ and the name of a user to mention them in a comment. This user will then receive a notification.

Jane Doe (multiplier)

Write your comment or note here

Quick actions ▾

Submit comment

All

Comments

Activity

**Damián Abellán (Dispatcher)** 2018-08-23 1:40 pm  
*Requires Update: Yes*

**Damián Abellán (Dispatcher)** 2018-08-23 12:39 pm  
Are you still meeting with this contact?  
[edit](#) [delete](#)

**Comments:** This shows all of the comments made by users about the contact

**Activity:** This is running list of all of the activity changes made to a Contact Record

**All:** View both Comments and Activity together

### Quick actions:

These are designed to help multipliers record their activity quickly when they are interacting with several contacts.

Quick actions ▾

- ✕ No Answer (0)
- 📞 Contact Established (0)
- 📅+ Meeting Scheduled (0)
- 📅✓ Meeting Complete (1)
- 📅✕ Meeting No-show (0)

## 5. Connections Tile

### Connections

#### Connections

**Groups**

**Baptized By**

**Baptized**

**Coached By**

**Coaching**

**Groups:** Quickly navigate to contact's group or church record

To add a new group or church, click the button 

**Baptized By:** Add the individual(s) who were involved with baptizing the contact.


**Baptized:** Add the individual(s) who the contact has personally baptized.


**Coached:** Add the individual(s) who is providing ongoing coaching for this contact

**Coaching:** Add the individual(s) who the contact is personally coaching.

## 6. Progress Tile

#### Progress

**Seeker Path** 

**Faith Milestones** 

Has Bible

Reading Bible

States Belief

Can Share Gospel/Testimony

Sharing Gospel/Testimony

Baptized

Baptizing

In Church/Group

Starting Churches

**Baptism Date**

### Progress

This tile helps a multiplier to keep track of a contact's spiritual journey.

**Seeker Path:** These are the steps that happen in a specific order to help a contact move forward.

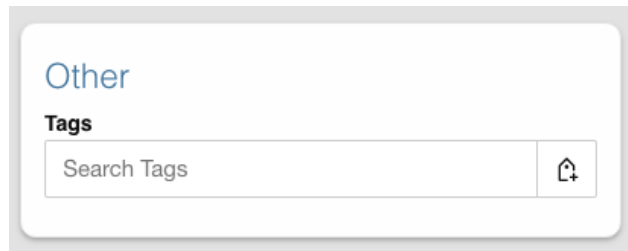
**File Milestones:** These are points in a contact's spiritual journey worth celebrating but can happen in any order.

**Baptism Date:** For metrics reporting, it is important to always note the day a person is baptized.

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## Other Tile

As Disciple.Tools develops, tiles will change and new ones will become accessible. If you have a need or request, contact your Zúme Disciple.Tools Admin who has the ability to edit and create custom tiles.

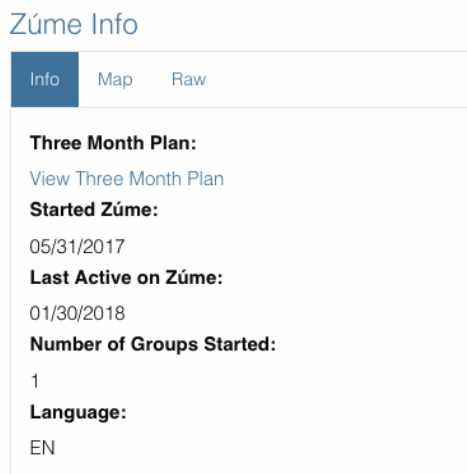


**Tags:** Add tags to contacts to help yourself and Zúme leaders quickly find contacts associated with noteworthy characteristics.

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## Zúme Info Tile

This is a customized tile for the Zúme instance of Disciple.Tools. This will capture a contact's information associated with their Zúme account.



## Groups List Page

This page functions the same way as the **Contacts List Page** except it represents Groups instead. From here you can create new groups, add custom filters, and view your groups and groups shared with you.

The screenshot shows the 'Groups List Page' in the DISCIPLE.TOOLS BETA application. The page has a dark blue header with the logo, 'Contacts' and 'Groups' tabs, a user profile 'Testy Tester', a notification bell, and a settings gear. Below the header is a navigation bar with 'Create new group', 'Filter groups', a search input 'search groups', and a 'Search' button. The main content area is divided into two sections. On the left is a 'Filters' sidebar with options: 'All groups', 'My groups' (selected), and 'Groups shared with me'. Below this is a 'Custom Filters' section with an 'Add new filter' button. The right section is titled 'Groups Showing 3 of 3 My Contacts' and includes a 'Sort' dropdown. It contains a table with columns: Name, Status, Type, Members, Leader, and Location. The table lists three groups: 'John Doe and family' (Active, Pre-Group, 3 members), 'San Fran Group' (Active, Pre-Group, 0 members), and 'Group 5' (Active, Pre-Group, 1 member). A 'Load more groups' button is located below the table. A help icon (?) is visible in the bottom right corner of the page.

Name	Status	Type	Members	Leader	Location
John Doe and family	Active	Pre-Group	3		
San Fran Group	Active	Pre-Group	0		
Group 5	Active	Pre-Group	1		

## Group Record Page

The **Group Record Page** functions similarly to the **Contact Record Page** but with group focused tiles.

The screenshot shows the 'Group Record Page' for 'John Doe and family'. The page is titled 'John Doe and family' and is currently 'Active'. It features several sections:

- Locations:** No location set
- Assigned to:** Testy Tester
- Start Date:** No start date
- People Groups:** No people group set
- Address:** No address set
- End Date:** No end date
- Leaders:** No leaders set

Below these are sections for 'Members' (with search filters for Bob, Jane Doe, and John) and 'Groups' (with search filters for Parent and Child Groups). A 'Progress' section shows the 'Group Type' as 'Pre-Group' and 'Health Metrics' including Fellowship, Giving, Communion, Baptism, Prayer, Leaders, Word, Praise, Evangelism, and Covenant.

On the right, there is a comment box and a list of activity logs:

- Testy Tester** 2018-09-10 3:43 pm: Baptism: No, Communion: No, Giving: No, Church Commitment: No, Leaders: Yes, Leaders: No, Sharing the Gospel: Yes, Church Commitment: Yes, Praise: Yes, Baptism: Yes, Communion: Yes, Giving: Yes, Prayer: Yes, Leaders: Yes, Leaders: No, Bible Study: Yes, Leaders: Yes, Fellowship: Yes.
- Testy Tester** 2018-09-07 2:21 pm: Added to group John Doe and family, Added to group John Doe and family, Group Status: Active, Group Type: Pre-Group, Assigned to: Testy Tester, Name changed to: John Doe and family, Deleted field.

## Group Details Tile

Change the **Group Details** by clicking “Edit”

This close-up shows the 'Group Details Tile' for 'John Doe and family'. It includes the group name, an 'Active' status dropdown, and an 'Edit' button. The details are as follows:

- Locations:** No location set
- Assigned to:** Testy Tester
- Start Date:** No start date
- People Groups:** No people group set
- Address:** No address set
- End Date:** No end date
- Leaders:** No leaders set

## Group Comments and Activity Tile

Record important information in regard to a group as a whole in the activity feed.

Write your comment or note here

Submit comment

All Comments Activity

## Members Tile

Add group members here to navigate quickly between the group record and their contact records.

Members

Bob × Jane Doe × John × Search Member

## Progress Tile

This area helps to track the spiritual progress a group makes as they become a healthy multiplying church.

Progress

Group Type

Pre-Group

Health Metrics ?

Fellowship Giving Communion

Baptism Prayer Leaders

Word Praise Evangelism

Covenant

### Group Type:

**Pre-Group:** This can be an unofficial group, a network of friends who a disciple knows

**Group:** A gathering of people who regularly meet around the Word of God

**Church:** When a group identifies themselves as a Church body



## Health Metrics:

These metrics have been identified as characteristics that describe a healthy church. By clicking on one of them, it activates the corresponding symbol in the circle.

The dotted line on the circle will become solid if the group has made a covenant to identify themselves as a church.



## Groups Connection Tile

This tile shows the relationships between multiplying groups and provides a way to navigate quickly between them.

The screenshot shows a 'Groups' section with a help icon. It contains two search boxes: 'Parent Group' with a 'Search Groups' input field, and 'Child Groups' with a 'Search groups' input field and a search icon.

**Parent Group:** This represents the group that multiplied into the current group.

**Child Groups:** This represents the group(s) that multiplied from the current group.

## Zúme Info Tile

This is a customized tile that provides details about a group in Zúme Training.

The screenshot shows a 'Zúme Info' section with tabs for 'Sessions', 'Info', 'Map', and 'Raw'. The 'Sessions' tab is active, displaying a list of sessions from Session 1 to Session 10. Sessions 1 through 8 are highlighted in green, while Sessions 9 and 10 are in white with blue borders.

Session	Date
Session 1	Jul 11, 2017
Session 2	Jul 11, 2017
Session 3	Jul 11, 2017
Session 4	Jul 11, 2017
Session 5	Jul 11, 2017
Session 6	Jul 13, 2017
Session 7	Jul 23, 2017
Session 8	Jul 23, 2017
Session 9	
Session 10	

# Interactive Tutorial

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## The Scenario

In your 3-month plan, you decided to prayer walk once a week. During one of your prayer walks, you got to talking to one of your neighbors, John, down the street who was out grabbing the mail. You asked if you could pray for him, and a great spiritual conversation began. He recalled going to a church as a kid, but hasn't really had friends in his life to talk about or even think about spiritual matters. He seemed really pleased to talk with you. You invited him and his wife, Jane, over for dinner. They are both in their 40s. As you got to know them, you shared with them about your desire to get to know your neighbors more and host a group in your home to discover the Bible together. John and Jane both expressed interest in joining. However, they both confessed that neither one of them own Bibles. While your spouse was dipping ice-cream for dessert, you go and wrap up a couple of Bibles and bring them down as gifts. They were both very grateful to receive them. Jane even said she wanted to bring her older sister and brother-in-law, Bob and Sue, to the group. You decide to set the date for Tuesday nights at 7 pm starting next week.

1. Add John as a new personal contact



2. Fill out the **Contact Form** and save it.


A screenshot of a contact form with the following fields: "Name of contact" (with a "Name" input field and a "This is required" note), "Phone number" (with a "Phone number" input field), "Email" (with an "Email" input field), "Location" (with a "Search Locations" input field), and "Initial comment" (with an "Initial comment" input field). A blue "Save and continue editing" button is at the bottom.

3. This is John's **Contact Record**. Disciple.Tools has been designed to help you keep your discipleship relationships organized so you can pray for them and help them on their journey to discovering, sharing, and obeying Jesus.
4. Add the additional information you learned from the story in the **Details** tile by clicking "Edit."
5. Return to the **Contacts List Page** by clicking "Contacts" in the website menu.

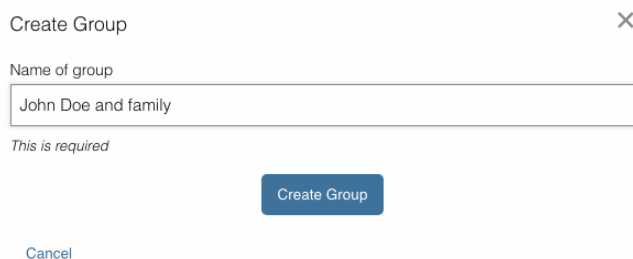
- Add Jane and her sister, Sue, and her brother-in-law, Bob, as new contacts.

 Create new contact

- After adding the final person, locate the **Connections** tile in his or her contact record.

- Create a group for them by clicking the add  group button.

- Name the group, “John Doe and Family” and click “Create Group”



Create Group ×

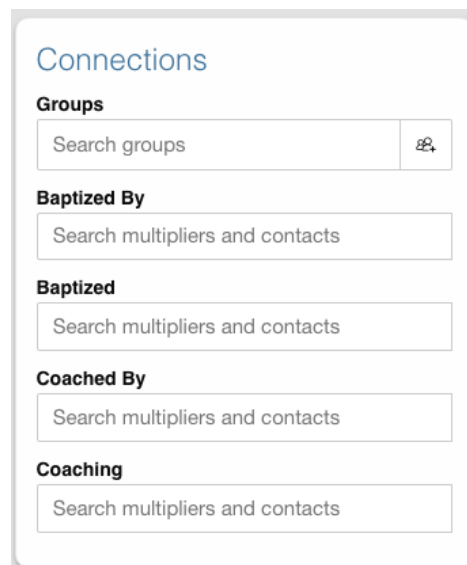
Name of group

John Doe and family

*This is required*

Create Group

Cancel



Connections

**Groups**

Search groups ⊞

**Baptized By**

Search multipliers and contacts

**Baptized**

Search multipliers and contacts

**Coached By**

Search multipliers and contacts

**Coaching**

Search multipliers and contacts

- Add the rest of the group by searching for them under the **Members** tile in the **Group Record**. Don't forget to add yourself, since you will be leading it. To save, click on any blank spot on the page.
- Edit the **Group Details** with additional information that you know. The start date will be the very next Tuesday on your calendar.
- Add the additional information you know about Jane by going to her contact record. To navigate to her record from the group, just click on her name in the **Members** tile.

---

## The First Meeting

Tuesday came and everyone showed up as planned. You decided to start the group off by going through the first session of the Hope Lesson. You all did a Three-Thirds style of Luke 18:9-14. Everyone participated and made a lot of great comments.

- Return to Disciple.Tools and click “Groups” located in the website menu.
- This is the **Groups List Page** which functions very similarly to the **Contacts List Page** as explained already. You can only view the groups that you create, you are assigned to, or that are shared with you by another user.
- Click on the group, “Jon Doe and Family”

- Update Disciple.Tools about how your first group meeting went. The **Comments and Activity** tile is a good place to log how meetings go so you don't forget important details.

Write your comment or note here

Submit comment

- Since this group is committed to meeting together consistently around the Word, change the **Group Type** in the **Progress** tile to "Group."

---

## Fast Forward

After meeting consistently for many months, on July 9th, John made the decision to get baptized as did his wife, Jane. You baptized John and John baptized his wife. The following week, Jane's sister also got baptized. Janet baptized her sister making that a third generation baptism. Another couple from Bob's office joined the group who were already believers, Jack and Ellen. After studying what it means to be a church fellowship, the group decided to identify itself as a church, to start giving some of their incomes to a worker overseas, and to continue sharing their stories and the gospel with family and friends.

- Return to Disciple.Tools and update John, Jane, and Sue's contact records. Under the **Progress** tile, mark they have been baptized. Don't forget to add the dates!
- Under the **Connections** tile add who baptized who
- Return to **Contacts List Page** and add the new couple's contact records
- Add the new couple to the **Group Record**
- Update the **Group Record's Health Metrics** from what you learned in the story

 Create new contact

### Health Metrics



Fellowship



Giving



Communion



Baptism



Prayer



Leaders



Word



Praise



Evangelism



Covenant