

Go Method

Trip Management for Team Leaders

Contents

- About Go Method4
- Team Leader's Guide.....5
- Purchase Travel Insurance for Participants6
- Manage Applicants8
 - Accept an Application8
 - Deny an Application9
- Complete a Background Check10
 - Who Can View My Background Check Results?.....10
- Event Meetings11
 - Schedule Event Meetings12
 - Remove Event Meetings14
 - Update Event Meetings.....16
- Funds18
 - Funding Milestones18
 - Add Funding Milestones19
 - Remove Funds from a Participant20
 - Add Funds to a Trip21
 - Set Cost of Trip22
 - Add Funds to a Participant Account23
 - Bulk Edit Trip Costs25
 - Issue a Refund.....26
 - Issue Refunds to Participants.....28
 - Issue Refunds to Donors30
 - Transfer Funds32
 - Transfer Funds to Multiple Participants34
 - Move Unassigned Funds to a Participant Account.....37

View the Audit Log.....	38
Rosters.....	39
Download the Team Roster.....	39
Download Your Group Roster	40
Downloadable Packets	41
About Download Packets	41
Create a Packet Type	42
Update a Packet Type	44
Download a Packet.....	45
Requirement Types	46
Complete Participant Requirements	47
Registration	48
Apply for a Mission Trip.....	48
Apply for a Trip for Multiple People	49
Register Someone Else.....	50
Register for an Event with Team Member Pricing	53
Add Participants to an Existing Registration.....	55
Register a Group or Family.....	57
View Group-Registered Participants	58
Manage Trip Leaders and Participants.....	60
Invite New Trip Leaders.....	60
Add Existing Trip Leaders to an Event	62
Add a New Participant to an Event.....	64
Add an Existing Participant to a Trip	66
Remove a Participant from an Event.....	68
Promote a Participant to a Trip Leader	69
Book Flights	70

- Book Flights with Go Method 70**
 - Book Flights with AFC Travel 71
 - Add an Existing AFC Travel Trip ID..... 72
 - Assign Participants to a Flight Contract..... 73
 - Download a Traveler's List 74
 - View Flight Itinerary Details 74
 - Book Flights with High Point Travel 75
 - Request a Flight Quote 75
 - Add an Existing High Point Travel Quote or Itinerary 76
 - Assign Participants to a Flight Contract 77
 - Submit a Final Traveler List..... 78
 - Download a Traveler's List 79
 - View Flight Itinerary Details 79

- Team Communication 80**
 - Discussions..... 80
 - Create Discussions..... 81
 - Delete Discussions 82
 - Edit Discussions..... 82
 - Send a Group Email to the Team 83

About Go Method

Go Method works with your church management system and other software integrations to create and manage mission trips and multi-day events.

Build and manage everything from your trip's details, applicants, team members, background checks, requirements, documents, funding, travel insurance, flights, and more. Use categories, filters, and affinity groups to filter your trips and make it easier for your participants to find the trip they're looking for. You can also create different roles with varying permissions so you and your staff can manage trips together.

Best of all, Go Method integrates with a variety of different software systems, including different ChMS options, payment providers, digital signature software, and more, so you can handle everything for your mission trip all in one place.

Team Leader's Guide

After an administrator invites you to be a team leader, you'll have permissions to manage your team.

What can I do as a team leader?

- Purchase travel insurance
- Approve or decline applications
- Complete background checks
- Organize event meetings
- View funding for your trips
- Download event rosters & packets
- Manage registration & requirements
- Manage trip leaders & participants
- Book flights for participants
- Manage discussions and communicate with team members

Purchase Travel Insurance for Participants

Go Method automatically enables travel insurance for your organization. We strongly recommend purchasing travel insurance for your trips, however you are not required to purchase travel insurance through our partner, Faith Ventures.

Before you begin

- You must be a Go Method admin or a trip leader to do this.

Context

Admins and trip leaders can purchase short- or long-term travel insurance plans for all their participants within a mission trip. Participants or guardians can purchase short- or long-term travel insurance for themselves and others they have registered through group registration. If you already purchased insurance that covers your trip with Faith Ventures, you can enter the order number and date in the corresponding fields.

Procedure

- 1 Go to **Events** → **My Events**.
- 2 Click on the event where you'd like to purchase travel insurance.
- 3 Click the **Insurance** tab.
- 4 Click **Group Options** under either **Short Term Plans** or **Long Term Plans**.

① **NOTE:** Whether you should purchase a short term plan or a long term plan depends on how long your trip is. Short term plans are for up to 180 days per trip. Long term plans are for up to 365 days of travel.

Trip Management for Team Leaders

Short Term Plans For up to 180 days per trip		Long Term Plans 365 days of travel available	
Emergency Evacuation	Illness Medical Expense	Adventure Sports	Dental Treatment
Accident Medical Expense	Repatriation of Remains	Death & Dismemberment	Return of Mortal Remains
Security Evacuation	Trip Cancellation	Emergency Evacuation	Lost Personal Property
Accidental Death	Missed Connection	Emergency Reunion	Political Evacuation
Trip Delay	Baggage Loss	Lost Passport or Visa	Trip Delay
Baggage Delay	Liability	Remote Transportation	Illness/Injury Medical Expense
Kidnap & Ransom		Baggage Delay	

Plans start at \$30

GROUP OPTIONS INDIVIDUAL OPTIONS

Plans start at \$455

GROUP OPTIONS INDIVIDUAL OPTIONS

Result: You will be redirected to the Faith Ventures website.

- 5 Determine which plan you want to purchase and enter your trip's travel dates.
- 6 Click **Import Go Method Travelers**.
- 7 Select the travelers you're purchasing insurance for by clicking the check box next to their names, and then click **Import Travelers**.
- 8 Click **Continue to Trip Details**.
- 9 Faith Ventures prompts you to provide your contact, trip, and payment information to complete the process.

TIP: Click **Copy from Go Method** to use the information stored in Go Method.

Result

Once you complete the purchase process, the coverage plan, policy number, and Faith Ventures contact information displays in the **Insurance** tab of the event. Also, in the team members list in the **Team Members** tab, an insurance icon will display next to the name of participants that have insurance for the trip.

Manage Applicants

Admins and trip leaders with the appropriate permissions can review event applications. However, there are several ways admins can review applicants:

- Review one applicant at a time for one event from the event's **Applicants** tab.
- Review one applicant at a time for multiple events from the **My Applicants** page.
- Review multiple applicants at a time for multiple events from the **My Applicants** page.
- Review applicants that applied through an application link from the **Applications** page.

Accept an Application

Allow an applicant to attend the trip or event they applied to.

Before you begin

- You must be a Go Method admin or a trip leader to do this.

Procedure

- 1 Click **Events**→**My Applicants**.
- 2 Select the applicant you want to review.
- 3 Under the **Profile** tab, click the **Actions** button.
- 4 Click **Accept Applicant**.
- 5 If the applicant is responsible for their own fundraising, select the corresponding check box.
- 6 **Optional:**
You can send a message to your applicant. They will receive an email with your acceptance message.
- 7 **Optional:**
You can include a note about the applicant. Only users who can view event notes will be able to see the note. That includes the applicant, unless they are able to view event notes.
- 8 Click **Send**.

Result

The application is approved.

Deny an Application

Deny an application to reject an applicant from going on a trip.

Before you begin

- You must be a Go Method admin or a trip leader to do this.

⚠ CAUTION: Once you deny an applicant, you can't reverse it.

Procedure

- 1 Click **Events** → **My Applicants**.
- 2 Select the applicant you want to review.
- 3 Under the **Profile** tab, click the **Actions** button.
- 4 Click **Deny**.
- 5 **Optional:**
You can send a message to your applicant as to why they were rejected. They will receive an email with your message.
- 6 **Optional:**
You can include a note about the applicant. Only users who can view event notes will be able to see the note. That includes the applicant, unless they are able to view event notes.
- 7 Click **Yes, Deny [Applicant Name]**.

Result

You have denied the applicant and the applicant can't reapply to the event.

Complete a Background Check

Participants can complete background checks in three ways: from their profiles, during event registration, and from an event. This article describes how to request a background check from your profile.

Before you begin

- Admins must approve A user can request a background check without being on an event that requires it before participants not attending an active event can request one.

Context

Participants can request or complete a background check to keep on file, even if they are not registering for an event.

Procedure

- 1 Click your profile picture and select **My Profile**.
- 2 On the left menu, click **Background Check**.
- 3 Click **Get a Background Check**.
- 4 Complete the form with your personal information.
- 5 **Optional:**
If required, enter your billing information to pay for the background check, then click **Pay for Background Check**.
- 6 After you read the disclosure and acknowledgments, click **Submit**.

Who Can View My Background Check Results?

Only admins and trip leaders can access background check results.

We do not store background check results in our database or on our servers. When you request a background check, your data is passed to our partner, Protect My Ministry. Results are never returned to us. When the background check results are final, we display a link in Go Method to the report stored with Protect My Ministry.

When background check results are complete, Protect My Ministry sends a link accessed through Go Method. Trip Leaders, Event Admins, and System Admins can view the results of a background check from this link.

Event Meetings

Let your trip participants know that you're hosting an in-person or virtual meeting about your trip.

Almost every group mission trip project benefits from one or two organizational meetings.

Meetings can be helpful to share information in the beginning and/or just before you travel.

Admins and trip leaders can create event meetings to prepare trip participants and other trip leaders for the trip.

Schedule Event Meetings

Admins and trip leaders can create in-person or virtual meetings to prepare participants and trip leaders for the trip.

Before you begin

- You must be a Go Method admin or a trip leader to do this.

Context

Almost every group mission project benefits from one or two organizational meetings, especially to share information in the beginning, or just ahead of travel dates.

Procedure

- 1 In the top menu, click **Events** → **My Events**..
- 2 Select an event.
- 3 Click the **Meetings** tab.
- 4 To schedule your first meeting, click **Create New Meeting**.
- 5 Enter the new meeting's details.
- 6 Do you want to email the details of this new meeting to your participants? Click **Yes** to send them the email.
 - a If you clicked **Yes**, enter the email subject and body in the corresponding fields.

The screenshot shows a web interface for creating a meeting. At the top, there is a question: "Send meeting details email to team members?" with "NO" and "YES" buttons. Below this is the "EMAIL CONTENT" section, which includes a "PREVIEW EMAIL" button and a text area for the "Email Subject" containing the text "Join us for a game plan meeting!". Below the subject field is a rich text editor with a toolbar containing icons for bold (B), italic (I), underline (U), list (≡), indent (≡), undo (↶), redo (↷), and link (🔗). The main text area contains the following content: "Hey [FirstName],", "We'd like you to join us for a meeting to help put together a game plan for our upcoming mission trip.", "Meeting Details:", "[MeetingDetails]", and "See you there!". At the bottom left of the form is a green "CREATE MEETING" button. On the right side of the form, there is a section titled "CUSTOM EMAIL TEMPLATES" which explains that merge fields can be used in custom text fields and lists two shortcodes: "Meeting Details" with the shortcode "[MeetingDetails]" and "First Name" with the shortcode "[FirstName]". Each shortcode has a "Copy" button next to it.

Trip Management for Team Leaders

- 7 Once complete, click **Create Meeting**.

Result

You've created your new meeting. If you selected **Yes**, an email with the meetings details will be sent to your event's participants.

Remove Event Meetings

Remove an event meeting you no longer want to hold.

Before you begin

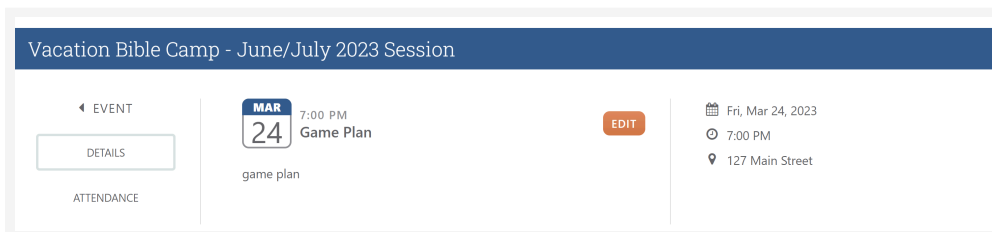
- You must be a Go Method admin or a trip leader to do this.

Context

⚠ CAUTION: This action cannot be undone. All meeting information, including details and attendance records, will be lost.

Procedure

- 1 Go to Events → My Events.
- 2 Select an event.
- 3 Click the Meetings tab.
- 4 Select the meeting you want delete.
- 5 Click Edit.



- 6 Click Delete Meeting.

Careful! If you delete this meeting, it can not be recovered, and any attendance records will be lost

DELETE MEETING

Trip Management for Team Leaders

- 7 In the browser pop-up message, click OK.

Result

All of the meeting's information, including details and attendance records, are erased. Attendees do not receive a notification that you removed the meeting.

Update Event Meetings

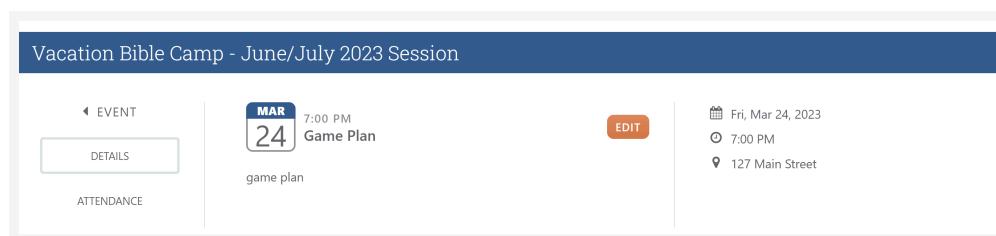
Update an event meeting to change the event meeting's details.

Before you begin

- You must be a Go Method admin or a trip leader to do this.

Procedure

- 1 In the top menu, click **Events** → **My Events**.
- 2 Select the event with the meeting you want to edit. Your event dashboard displays.
- 3 Click the **Meetings** tab.
- 4 Click the meeting you want to edit.
- 5 Click **Edit**.



- 6 Edit the meeting's details.
- 7 Do you want to email the details of this new meeting to your participants? Click **Yes** to send them the email.
 - a If you clicked **Yes**, enter the email subject and body in the corresponding fields.

Trip Management for Team Leaders

Send meeting details email to team members? NO YES

EMAIL CONTENT PREVIEW EMAIL

Email Subject

Join us for a game plan meeting!

B I U

Hey [FirstName],

We'd like you to join us for a meeting to help put together a game plan for our upcoming mission trip.

Meeting Details:

[MeetingDetails]

See you there!

CREATE MEETING

CUSTOM EMAIL TEMPLATES

Merge fields can be pasted into custom text fields using the following shortcodes:

Meeting Details
[MeetingDetails]
Copy

First Name
[FirstName]
Copy

8 Once complete, click **Update Meeting**.

Result

You've updated your meeting. If you selected **Yes**, an email with the meetings updated details will be sent to your event's participants.

Funds

Funding Milestones

Funding milestones are designed to help event admins manage funding due dates for events and participants.

Admins set funding milestones when creating or editing an existing event's details. You will specify a percentage or dollar amount and the due date. If participants do not meet milestones, admins and trip leaders will see the phrase *Funding Behind* displayed beside the name of the participant.

Participants who haven't met milestones will see a notification banner with the amount due on the dashboard as they sign in. The banner also displays on the participant funding page.

Add Funding Milestones

Set funding milestones while creating an event, or edit an event to add them later.

Before you begin

- You must be a Go Method admin to do this.

Context

A fund is a pool of money set aside for a specific purpose. One way you can help participants pay for a mission trip is to break total costs into manageable payments over a certain period of time. Participants can then make steady progress toward funding a trip by a certain date, rather than scrambling at the last minute to fund their trip.

Procedure

- When creating an event, scroll to the Funding Milestones section and click **ADD MILESTONE**.

NOTE: To add a funding milestone to an existing event, double-click the event name, then click the **Details** tab and click **Edit**.

- Enter the funding milestone's name, dollar or percent amount, and due date in the corresponding fields. To add more than one funding milestone, repeat this process.

The screenshot shows a form titled "FUNDING MILESTONES" with four rows of input fields. Each row contains a goal name, a dollar amount, an equals sign, a percentage amount, a percentage symbol, and a due date with a calendar icon and a delete 'X' icon. Below the rows is a green "ADD MILESTONE" button.

Goal Name	Dollar Amount	Percentage Amount	Percentage Symbol	Due Date	Delete
First goal	\$ 25	= 25	%	03/27/2023	X
Second goal	\$ 50	= 50	%	04/10/2023	X
Third goal	\$ 75	= 75	%	05/01/2023	X
Final goal	\$ 100	= 100	%	05/30/2023	X

ADD MILESTONE

- To delete a milestone, click the X.

Remove Funds from a Participant

Remove funds from participant trip funding.

Before you begin

- You must be a Go Method admin to do this.

Context

Remove funds from one participant so you can reallocate the funds elsewhere. For example, if Sally received a portion of unallocated funds in error, you can remove the previously unallocated funds from her funding.

Procedure

- Go to Events → My Events.
- Click the event that has the funds you want to remove.
- On the left menu, click Team Members → View Team Members.
- Click on the participant you want to remove the funds from.
- Click the Funding tab.
- Click on the transaction you want to remove.

The screenshot shows a participant's funding page. At the top, it displays 'FUNDING TO DATE' as \$212.00 and 'TOTAL TRIP FUNDING' as 212% FUNDED with \$112.00 OVER. A table lists transactions with columns for Date, Name, Type, Reference #, and Current Balance. The first transaction is from John James, dated 10/18/2022, for \$196.00. A menu is open below this transaction, showing options: Notes (0), Remove Donation, Issue a Refund, Transfer Funds, Audit Log, and Donator Info. The 'Remove Donation' option is highlighted with a red box.

Date	Name	Type	Reference #	Current Balance
10/18/2022	John James	Donated	7713800539	\$196.00
10/18/2022	Trixie Beldon	Donated	7713799766	\$11.00
10/18/2022	Trixie Beldon	Initial Payment	7713795718	\$5.00
Total				\$212.00

Result: A list of options appears below the transaction.

- Click Remove Donation.
- In the Remove Funds pop-up, click Remove Allocation.

Result

The transaction now displays a \$0.00 value in the participant funding, and the Audit Log displays the history of the transaction, which now includes the removal of the donation.

Add Funds to a Trip

Add funding to a specific trip in Go Method.

Before you begin

- You must be a Go Method admin to do this.

Procedure

- 1 Go to Events → My Events.
- 2 Click on the event you want to add funds to.
- 3 Click the Funding tab.
- 4 Click Add Funds.
- 5 Enter the fund's information.
 - a Select the fund type from the drop-down list.
 - b Optional:
Enter the donor information.
 - c Enter the amount of the fund.
 - d Optional:
Add a reference number for the fund.
 - e Optional:
Add a note about the fund.
- 6 Click Add Funds.

Result

The fund is now listed in the event's funding tab.

Set Cost of Trip

Admins can increase or decrease the total funding requirement for one participant in the Team Members section of an event.

Before you begin

- You must be a Go Method admin to do this.

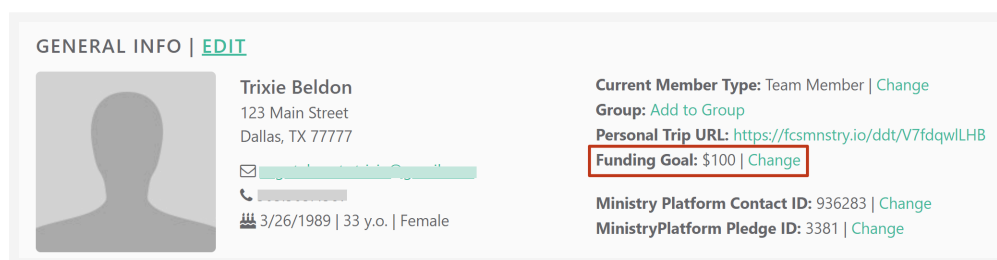
Context

Editing funding for a single participant can be useful for:

- Allowing a popular participant to raise more money than their cost for the trip.
- An alternative to creating an allocation for staff or other discounts.
- Managing special funding circumstances more simply.

Procedure

- 1 Go to **Events** → **My Events**.
- 2 Click the event.
- 3 On the left menu, click **Team Members** → **View Team Members**.
- 4 Click on a participant.
- 5 Click the **Profile** tab.
- 6 Next to their current funding goal, click **Change**.



The screenshot shows a user profile for 'Trixie Beldon' with the following details:

- GENERAL INFO** | [EDIT](#)
- Profile Picture:** A placeholder silhouette.
- Name:** Trixie Beldon
- Address:** 123 Main Street, Dallas, TX 77777
- Contact:** Email and phone icons with redacted information.
- Demographics:** 3/26/1989 | 33 y.o. | Female
- Current Member Type:** Team Member | [Change](#)
- Group:** [Add to Group](#)
- Personal Trip URL:** <https://fcsmnstry.io/ddt/V7fdqwlLHB>
- Funding Goal:** \$100 | [Change](#) (This field is highlighted with a red box in the original image)
- Ministry Platform Contact ID:** 936283 | [Change](#)
- MinistryPlatform Pledge ID:** 3381 | [Change](#)

- 7 Enter the new amount into the **Funding Goal** field.
- 8 Click **Update Goal**.

Result

The participant can see the new amount in the Funding Goal section of their profile. The new funding goal is also noted on the Team Member view, the personal funding page of the participant, and the total funding goal for the trip. Donors can continue to give toward the trip even after the trip goal has been met.

Add Funds to a Participant Account

Add funds to a specific participant in Go Method.

Before you begin

- You must be a Go Method admin to do this.

Context

You may receive donations for a participant through channels other than the participant donation page. If this occurs, these funds may be added to the participant account manually by an admin.

Procedure

- 1 Go to **Events** → **My Events**.
- 2 Click on the event you want to add the funds to.
- 3 On the left menu, click **Team Members** → **View Team Members**.
- 4 From the Team Members list, select the participant you want to apply the donation to.
- 5 Click the **Funding** tab.
- 6 Click **Add Funds**.
- 7 Enter the donation details.
 - a **Fund Type:** Select one of the three funding types: **New Donation**, **Transfer from Unallocated**, or **Another Allocation Type**. Once you select from the drop-down list, the menu will change to reflect the information needed.
 - b **Allocation Type:** Choose the source of the donation from the available options in the drop-down list. These are all of the allocation types you have created in your account.
 - c **Donor Name:** Enter the name of the individual who donated. You can search to see if they are in the system, or add their name, email address, and phone number.
 - d **Amount:** Enter the amount of the donation in dollars.
 - e **Optional:**
Reference Number: Include a reference number here to help track funds for your accounting team.
 - f **Optional:**
Note: Add any details you want to capture about this donation.
 - g You may also choose to hide the donation amount from the participant who

Trip Management for Team Leaders

... receives the donation by clicking the corresponding check box.

8 Click Add Funds.

Result

You will be redirected back to the participant funding details screen, where the donation should now appear.

Bulk Edit Trip Costs

Admins can update an event's funding requirements in the Payment Options section of an event to automatically edit funding requirements for all of the event's participants.

Before you begin

- You must be a Go Method admin to do this.

NOTE: If you are an admin AND a participant, you will need to have another admin change your funding total. Admins can't complete tasks for themselves or edit their funding totals.

Procedure

- 1 Go to Events → My Events.
- 2 Click the event.
- 3 Click the Details tab.
- 4 In the top section, click Edit.
- 5 Under the Payment Options section, update the dollar amount.

PAYMENT OPTIONS

PAYMENT STRUCTURE (HOW SHOULD MONEY BE TRACKED)

Donation: Allow for fundraising and donations

WARNING: Pay structure cannot be edited once the event is launched.

TOTAL COST PER PERSON

\$ 150

DEPOSIT PER PERSON

\$ 5

No deposit required?
Leave this box empty.

UPDATE ALL MEMBERS WITH A FUNDING GOAL OF \$100 TO THE NEW COST.

Result: A check box confirms the new funding requirement for all participants associated with this trip.

- 6 Click Save Changes.

Result

The funding requirement has been updated for all participants on this trip.

Issue a Refund

Initiate a refund for payments made in Go Method.

Before you begin

- You must be a Go Method admin to do this.

Procedure

- 1 Go to **Events** → **My Events**.
- 2 Click on the event that contains the donation you want to refund.
- 3 On the left menu, click **Team Members** → **View Team Members**.
- 4 Click on the participant that has the donation you want to refund.
- 5 Click the **Funding** tab.
- 6 Click on the line item.

⚠ CAUTION: If the donation was made to the trip and not a participant, you must open a support ticket with us to refund/remove that donation.

The screenshot shows a web interface for trip management. On the left is a navigation menu with options: Back, PROFILE, TRIP STORY, REQUIREMENTS, FUNDING (selected), NOTES, and MOVE EVENTS. The main content area displays 'FUNDING TO DATE' as \$212.00 and 'TOTAL TRIP FUNDING' as 212% FUNDED with a blue progress bar and \$112.00 OVER. Below this is a table of funding entries. The first entry is for John James, a \$196.00 donation. The second entry is for Trixie Beldon, a \$11.00 donation. The third entry is for Trixie Beldon, a \$5.00 initial payment. A red box highlights the action menu for the \$11.00 donation, which includes: Notes (0), Remove Donation, Issue a Refund (highlighted), Transfer Funds, Audit Log, and Donator Info. A total row at the bottom shows \$212.00.

Date	Name	Type	Reference #	Current Balance
10/18/2022	John James	Donated	7713800539	\$196.00
10/18/2022	Trixie Beldon	Donated	7713799766	\$11.00
10/18/2022	Trixie Beldon	Initial Payment	7713795718	\$5.00
Total				\$212.00

Result: The line item funding options drop-down buttons display.

- 7 For payments and donations processed through the platform, click **Issue a Refund** to initiate a refund back to the original donor or participant. This refund goes back to the same card or bank account that they paid from through your payment processor, and it will be processed in the time line outlined by your merchant provider.

📌 NOTE: If you prefer to issue a refund to the donor or participant using a check directly from your organization, click **Remove Donation** rather than **Issue a Refund**.

Trip Management for Team Leaders

Result

You have initiated a refund of the funds.

Issue Refunds to Participants

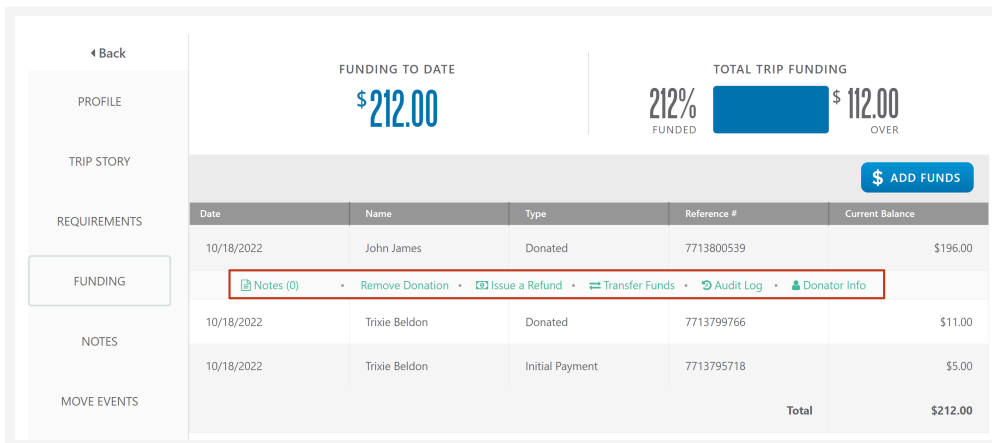
Admins can issue total or partial refunds for payments from participants.

Before you begin

- You must be a Go Method admin to do this.
- You must be a ChMS system admin to do this.

Procedure

- 1 In the top menu, click **Events**→**My Events**.
- 2 Select the event the participant you want to refund funds to is attending.
- 3 In the left menu, click **Team Members**→**View Team Members**.
- 4 Select a participant to issue a refund towards.
- 5 Click the **Funding** tab.
- 6 Click the line item you want to refund.



Result: The funding options drop-down menu appears.

- 7 Click **Issue a Refund**.
- 8 Select **Refund total amount** or **Issue a partial refund**.

NOTE: If the payment you are refunding was made through another ChMS, you will be redirected to that ChMS to continue refunding.

- a If you select **Issue a partial refund**, you can set the refunded amount.

Trip Management for Team Leaders

Refund Payment

Are you sure you want to refund this payment?
Be careful, once you have refunded the payment you can't reverse it.

Refund total amount. (\$19.61) Issue a partial refund.

- 9 Once complete, click Yes, Refund Payment.

Issue Refunds to Donors

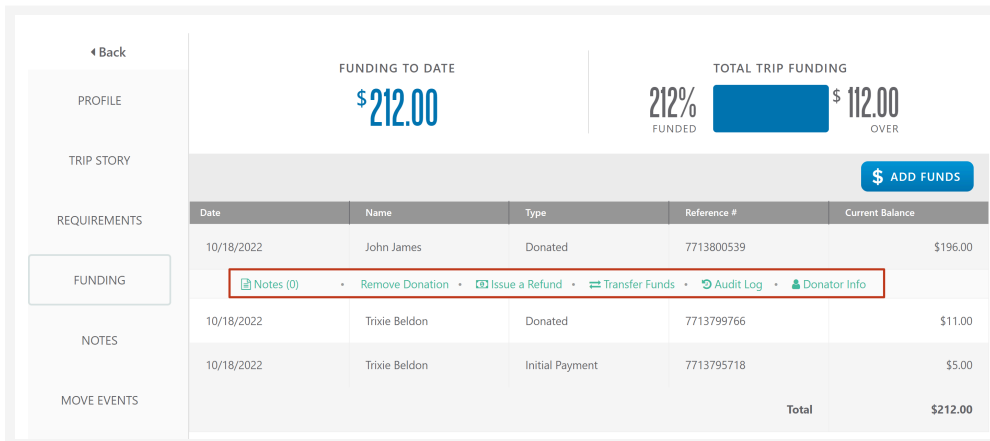
Admins can issue total or partial refunds to donors.

Before you begin

- You must be a Go Method admin to do this.
- You must be a ChMS system admin to do this.

Procedure

- 1 In the top menu, click **Events** → **My Events**.
- 2 Select the event with the donations you want to refund.
- 3 In the left menu, click **Funding**.
- 4 Click on the name of the donor you want to refund.
- 5 From the drop-down list, click **Issue a Refund**.



The screenshot shows a web interface for trip funding. On the left is a navigation menu with options: Back, PROFILE, TRIP STORY, REQUIREMENTS, FUNDING (highlighted), NOTES, and MOVE EVENTS. The main content area is titled 'FUNDING TO DATE' and shows '\$212.00'. To the right, 'TOTAL TRIP FUNDING' is shown as '212% FUNDED' with a blue progress bar and '\$112.00 OVER'. Below this is a table of donations with columns: Date, Name, Type, Reference #, and Current Balance. The table contains three rows: John James (Donated, \$196.00), Trixie Beldon (Donated, \$11.00), and Trixie Beldon (Initial Payment, \$5.00). A total row shows '\$212.00'. A dropdown menu is open for the first row, showing options: Notes (0), Remove Donation, Issue a Refund (highlighted), Transfer Funds, Audit Log, and Donator Info. An 'ADD FUNDS' button is also visible.

Date	Name	Type	Reference #	Current Balance
10/18/2022	John James	Donated	7713800539	\$196.00
10/18/2022	Trixie Beldon	Donated	7713799766	\$11.00
10/18/2022	Trixie Beldon	Initial Payment	7713795718	\$5.00
Total				\$212.00

- 6 Select Refund Total Amount or Issue a Partial Refund.

NOTE: If the donation was made in a ChMS, you will be prompted to log in to that ChMS to initiate refunds.

- a If you select **Issue a Partial Refund** enter an amount to refund.

Trip Management for Team Leaders

Refund Payment

Are you sure you want to refund this payment?
Be careful, once you have refunded the payment you can't reverse it.

Refund total amount. (\$19.61) Issue a partial refund.

7 Once finished, click Yes, Refund Payment.

Transfer Funds

Transfer funds between participants or events.

Before you begin

- You must be a Go Method admin to do this.

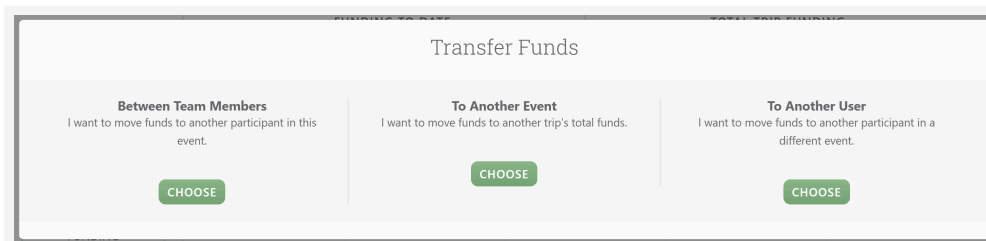
Context

You can transfer funds between participants, trip, or another user. You can also transfer funds to "unallocated", as long as the funds remain attached to the same trip. Admins will also be able to view an Audit Log to track actions taken on individual transactions.

NOTE: If you attempt to move more funds than is needed to a participant, or if you select a participant that is fully funded, you will be prompted to select a different amount or participant.

Procedure

- 1 In the top menu, click **Events**→**My Events**..
- 2 Select the event you want to transfer funds from.
- 3 From the event dashboard, click **Team Members**→**View Team Members**.
- 4 Select a participant to transfer funds from. This displays their profile.
- 5 On the participant profile, click **Funding**.
- 6 Select the transaction you want to re-allocate and click **Transfer Funds**.
- 7 Select where to transfer funds. You can transfer funds between participants, to another event, or to another user.
- 8 Click **Choose** to begin transferring funds between participants, another event, or another user.



- 9 Click on a participant, event, or user(s) from the drop-down menu to transfer fund to.
- 10 Enter an amount to transfer.

Trip Management for Team Leaders

11 Click Yes, Transfer Funds.

Transfer Funds to Multiple Participants

Move funds from one participant to other participants within the same trip.

Before you begin

- You must be a Go Method admin to do this.

Context

Rather than moving funds from one participant to another one at a time, you can choose to distribute funds from one participant to up to four other participants at one time. You can distribute the funds evenly among the selected participants, or you can allocate specific amounts to specific participants. For example, if a participant receives a trip donation and is now over-funded, you can distribute the remaining amount to other trip participants.

Procedure

- 1 Go to **Events**→**My Events**.
- 2 Select the event.
- 3 On the left menu, click **Team Members**→**View Team Members**.
- 4 Select the participant whose funds you want to transfer. This brings you to their profile.
- 5 Click the **Funding** tab.
- 6 Select the transaction you want to re-allocate and click **Transfer Funds**.
- 7 Under the **Between Team Members** section in the transfer funds message box, click **Choose**.
- 8 Select one of two options:
 - a To distribute the money evenly among the selected participants, select the **Distribute [monetary value] evenly between selected participants** check box and select the participants you want to allocate the funds to.




Trip Management for Team Leaders

I want to move funds to other participants in this event.

Left amount to transfer
\$0.00

Mark donation as anonymous for selected participants
 Distribute \$500 evenly between selected participants

Q SEARCH TEAM MEMBERS

Team Member	Amount
<input type="checkbox"/>  Angelina Banks	0.00
<input checked="" type="checkbox"/>  Daniel Thomas	250
<input checked="" type="checkbox"/>  Katheryn Doe	250

- b** To distribute specific amounts to specific participants, deselect the **Distribute [monetary value] evenly between selected participants** check box, select the participants you want to allocate funds to, and enter the amount you want to allocate to those participants in the field provided.

Trip Management for Team Leaders




I want to move funds to other participants in this event.

Left amount to transfer
\$0.00

Mark donation as anonymous for selected participants

Distribute \$500 evenly between selected participants

🔍 SEARCH TEAM MEMBERS

	Team Member	Amount
<input checked="" type="checkbox"/>	 Angelina Banks	<input type="text" value="100"/>
<input checked="" type="checkbox"/>	 Daniel Thomas	<input type="text" value="200"/>
<input checked="" type="checkbox"/>	 Katheryn Doe	<input type="text" value="200"/>

9 When finished, click Yes, Transfer Funds.

Move Unassigned Funds to a Participant Account

Unassigned Funds are gifts that have not been assigned to any particular participant.

Before you begin

- You must be a Go Method admin to do this.

Context

Donations made to an overall trip are designated as **unallocated funds**, meaning they have not been assigned to any particular participant. These funds may be added manually to any participant account by the event's admin or a trip leader with the appropriate permissions.

Procedure

- 1 Go to **Events**→**My Events**.
- 2 Click on the event.
- 3 On the left menu, click **Team Members**→**View Team Members**.
- 4 Click on the participant you want to move the unallocated funds to.
- 5 Click the **Funding** tab.
- 6 Click **Add Funds**.
- 7 Enter the donation details:
 - a **Donor Name:** Enter the name of the individual, ministry, or other donor designation as appropriate.
 - b **Amount:** Enter the amount of the donation in dollars.
 - c **Allocation Type:** Choose **Unallocated** from the drop-down list. This will remove the funds from your unallocated funds pool.
 - d **Optional:**
Reference Number: Include a reference number here to help track funds for your accounting team.
 - e **Optional:**
To hide the donation amount from the team member receiving this donation, select the **Hide the Donation Amount** check box.
- 8 Click **Add Funds**.

Result

The funds have been moved from the unallocated funds pool and assigned to the participant. The donation will now appear in the participant funding details screen.

View the Audit Log

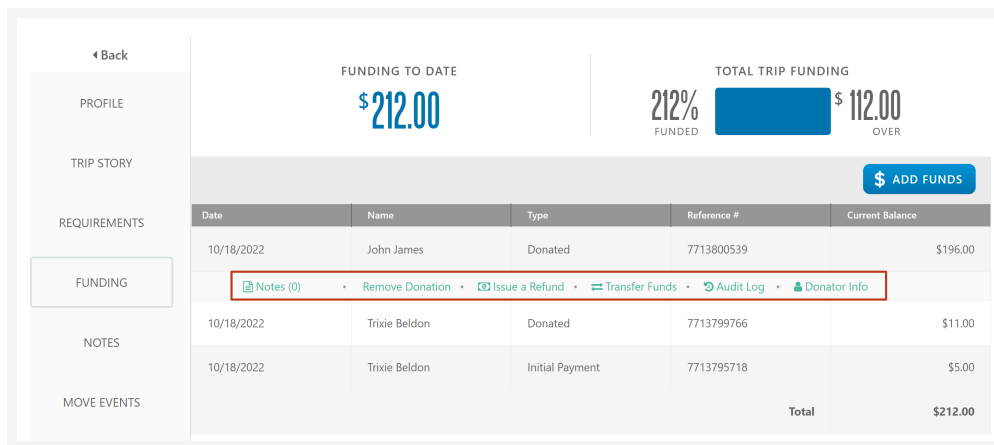
See a record of information and/or changes about a specific donation.

Before you begin

- You must be a Go Method admin to do this.

Procedure

- 1 Go to Events → My Events.
- 2 Click on the event.
- 3 Click the Funding tab.
- 4 Click on the line item.



Result: A list of options displays below the line item.

- 5 Click **Audit Log**.
- 6 When finished, click **Close**.

Rosters

Download the Team Roster

A team roster is a list of participant names, whose group they're in, contact information, requirement details, and other basic information placed into a CSV file.

Before you begin

- You must be a Go Method admin to do this.

Context

Download a team roster to assist with making travel arrangements and other planning.

Procedure

- 1 In the top menu, click **Events**→**My Events**.
- 2 Select the event you want to download the team roster for. The event's dashboard displays.
- 3 On the left menu, click **Team Members**→**View Team Members**.
- 4 On the right, click **Actions**→**Download Roster**.

Result

A CSV file with your team roster's information downloads to your computer. The file location may vary depending on your browser and default settings.

Download Your Group Roster

Group leaders can download their group's roster to assist with travel arrangements and other trip management.

Before you begin

- You must be the group's leader to do this.

Procedure

- 1 Click the event whose roster you want to download.
- 2 Click the **Team Members** tab.
- 3 Click **Actions**→**Download Roster**.

Result

A CSV file with your group's information downloads to your computer. The file location may vary depending on your browser and default settings.

Downloadable Packets

About Download Packets

Download packets contain all profile information, application answers, emergency contacts, and completed requirement information for everyone going on the trip.

Download packets are an easy way to take important travel documents with you. Depending on the packet type, it may include profile information, application answers, emergency contacts, and completed requirements such as signed documents, files that were uploaded, and question forms for all team members within a trip. Packets downloaded as PDF's can be viewed, printed, or stored on a thumb drive or other easily accessible device for safekeeping.

You must first create a packet type and then you can download them.

Create a Packet Type

Assemble a template for a group of documents.

Before you begin

- You must be a Go Method admin to do this.

Context

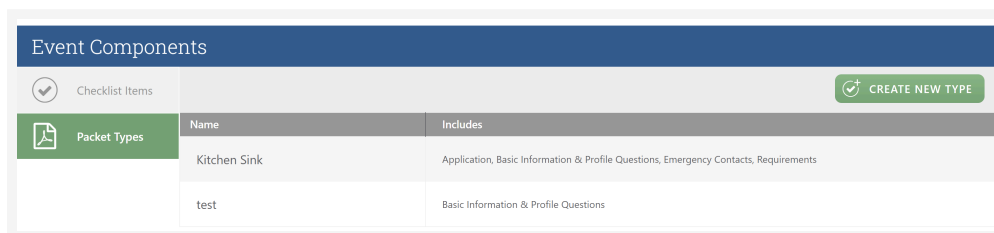
Download packets contain all profile information, application answers, emergency contacts, and completed requirement information for everyone going on the trip. You can create different packet types depending on what information you want in the packet. For example, you can create a packet type that contains everything a trip leader needs for an international trip versus maybe just profile information and emergency contacts for those leading a VBS session.

Procedure

- 1 Go to Events → Packet Types.

Result: You'll see a list of other packet types and what they include.

- 2 Click Create New Type.



Event Components		
<input checked="" type="checkbox"/> Checklist Items		<input checked="" type="checkbox"/> CREATE NEW TYPE
<input checked="" type="checkbox"/> Packet Types	Name	Includes
	Kitchen Sink	Application, Basic Information & Profile Questions, Emergency Contacts, Requirements
	test	Basic Information & Profile Questions

- 3 Enter the Packet Name.

- 4 Enter a brief description.

NOTE: There is a maximum of 500 characters for the packet type description.

- 5 Using the corresponding check boxes, select whether this packet type includes **Basic Information & Profile Questions, Emergency Contacts, Application, and/or Requirements.**

- 6 Click Create Packet Type.

Trip Management for Team Leaders

A Packet Type is a specific package of information about an event that leaders can download for their event. It will include the selected data for all participants on an event, in a convenient PDF format.

Packet Name

No Application

Brief Description (max 500 characters)

For trips and events that didn't require application questions.

Basic Information & Profile Questions
Each participant's name, DOB and contact information.

Emergency Contacts
Each participant's emergency contact information

Application
Answers to the trip's application questions

Requirements
Details of each participant's event requirements, including:

- Uploads (PDFs, PNG, JPG)
- Signed documents
- Question forms

CANCEL **CREATE PACKET TYPE**

Result

The newly created packet type now shows in the packet types list.

Update a Packet Type

Edit and update a packet type name, description, and information.

Before you begin

- You must be a Go Method admin to do this.

Context

Download packets contain all profile information, application answers, emergency contacts, and completed requirement information for everyone going on the trip.

Procedure

- 1 Go to **Events** → **Packet Types**.
- 2 Click the packet type you want to edit.
- 3 Edit the packet type. You can edit the **Packet Name**, **Brief Description**, and information-type check boxes.
- 4 Click **Update Packet Type**.

Result

The packet type has been updated.

Download a Packet

Download a packet with all the participant information that you'll need for your trip.

Before you begin

- You must be a Go Method admin or a trip leader to do this.
- You must have already created a packet type.

NOTE: Steps may vary slightly based on your web browser. The following steps used Google Chrome.

Context

Downloaded packet information includes profile information, application answers, emergency contacts, and completed requirements (signed documents, uploads, and question forms) for all participants within an event.

Procedure

1 On the Events page, select a trip.

2 On the left menu, click **Team Members** → **Download Packets**.

Result: You will see a list of download packets connected to the event.

3 Click the download button  next to the corresponding packet type.


Result: A **Download is processing** progression bar displays.

NOTE: Make sure your pop-up blocker allows pop-ups for this website. If pop-ups are blocked, your download packet may not download.

4 Click the zip file to open the download packet.

Result: Depending on the information you included in the packet type, there should be a list of PDFs with all your participant information.

5 Click each PDF to open it.

6 Click either **Download**  or **Print**  to download or print the download packet.

Result

You have successfully downloaded a travel packet. You can print the packet or store it safely on a thumb drive or other easily accessible storage.

Requirement Types

You can create requirements for the things you want participants to complete before your event begins.

Task Requirement Type

Participants are responsible for completing task requirements. Examples of the task requirement type include meeting attendance, checking church membership, or checking background checks.

User Upload Requirement Type

User upload requirements is for any document you need participants to upload. Examples of user upload requirements include a copy of their passport, driver's license, or immunization record.

Sign Document Requirement Type

The sign document requirement type is to gather electronic signatures from your participants on any legal documents created in Documents.

Read & Accept Requirement Type

The sign document requirement type is to ensure your participants are aware of guidelines, policies, or any required reading you want to create. You can upload a file.

Download & Upload Requirement Type

Use the Download & Upload requirement type to allow participants to download forms that need to be notarized or otherwise processed by hand, and then re-upload them back to you.

Question Form Requirement Type

Use the Question Form requirement type to gather information and preferences from your participants.

Complete Participant Requirements

Complete and mark participant requirements as complete for another participant.

Before you begin

- You must be a Go Method admin or a trip leader to do this.

Context

Trip Leaders can complete and check off participant requirements. Requirements can include checking off meeting attendance, uploading required documents, and more.

Procedure

- In the top menu, click **Events** → **My Events**.
- Select the event the participant is attending.
- On the left menu, click **Team Members** → **View Team Members**.
- Select a participant. This directs you to the participant profile page.
- Click the **Requirements** tab.
- Click the requirement you want to complete for the participant and click **Mark Complete**.

Done?	Requirement	Due Date
<input type="checkbox"/>	All - Question Form - Question Form	PAST DUE (1/18/2023)
<input type="checkbox"/>	Camp: Camp Rules Acknowledgment - Read & Accept	PAST DUE (1/18/2023)
<input checked="" type="checkbox"/> Mark Complete		
<input type="checkbox"/>	Trip Consent Form - Sign Document	PAST DUE (1/18/2023)

Result

Once completed, requirements will display a check.

Done?	Requirement	Due Date
<input type="checkbox"/>	All - Question Form - Question Form	PAST DUE (1/18/2023)
<input checked="" type="checkbox"/>	Camp: Camp Rules Acknowledgment - Read & Accept	Completed on 3/20/2023
<input type="checkbox"/>	Trip Consent Form - Sign Document	PAST DUE (1/18/2023)

Registration

Apply for a Mission Trip

Context

Follow the directions below to apply for a mission trip.

Procedure

- 1 Click on the trip you want to apply to.
- 2 Click **Apply Today** to access the trip's application.
 - a If you need an account, click **Create an Account**. Enter your full name, email address, date of birth, gender, and create a password. Click **Sign Me Up** and continue with your application.
- 3 To register yourself for the trip, select **Yes** and your information appears. To register someone else, select **No**, enter the other applicant's information, and click **Add 'em!**
- 4 Click **Yep, that's everybody!**
- 5 Confirm your registration type and complete any application questions, requirements, and more. To complete these tasks, click the **Resolve** next to each application requirement and follow the steps to complete each task. When finished, click **Continue**.
- 6 If applicable, make any payments or deposits and click **Continue to Final Step**.
- 7 If applicable, enter your billing and payment information and click **Submit Application**.

Result

Once you've submitted your application, you'll see a confirmation screen. You'll receive an email once your application is approved.


Apply for a Trip for Multiple People

Register more than one person at a time for a trip.

Context

You can register multiple people for an event to create your own group within the event. For example, if you want to register yourself and your family members for a trip, you can register them at the same time you're applying for the trip rather than apply one person at a time.

Procedure

- 1 Click **Learn More** to view a trip's page.
- 2 Click **Apply Today** to begin the application.
- 3 To register yourself for the trip, select **Yes** and your information appears. To register someone else, select **No**, enter the other applicant's information, and click **Add 'em!**. To register more people for this event, click **Add Another Person** and repeat this step.
- 4 Once you are finished adding people to registration, click **Yep, that's everybody!**.
- 5 Fill out application questions. If you're registering yourself, click **I'll answer the questions now**. If you're registering other members of a group, click **Send [member name] the questions via email**.

- 6 Once complete, click **Continue**.
- 7 **Optional:**
If applicable, fill out the coupon code and select an amount from **Paying today**.
- 8 Click **Continue to Final Step** and, if applicable, fill out the billing and payment information.
- 9 Once complete, click **Submit Application**.

Register Someone Else

Go Method has a parent-guardian system that allows you to register someone else or, fulfill requirements, and pay fees even when you are not attending an event.

Before you begin

- You need your own account to register someone else.

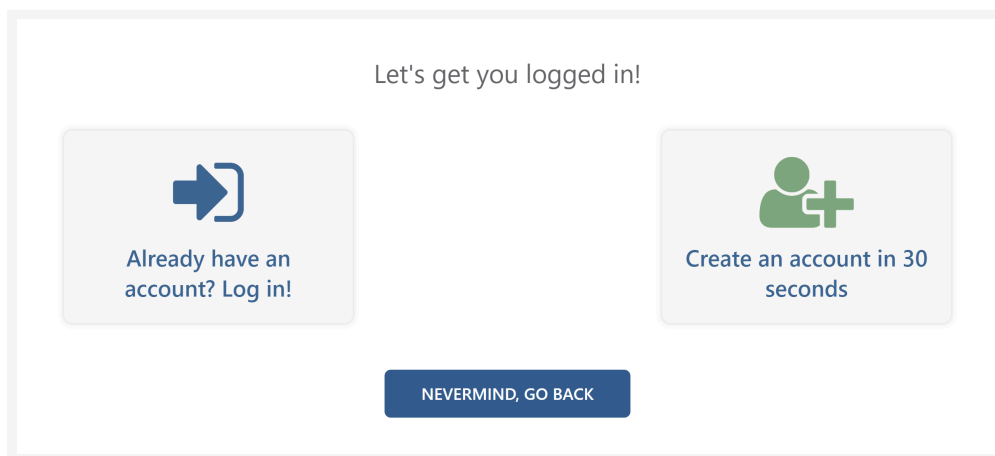
Context

When a parent or guardian registers a child, they become a "guardian" in Go Method. From this point on, the parent or guardian receives any communication for these participants. However, if a parent instructs an older teen to register themselves, the parent is not automatically included in future email communication. The trip leader or an administrator must manually include the parent or guardian to future email communications.

Procedure

- 1 Find the event your child or teen wants to apply to and click **Apply Today!**
- 2 Click **Already have an account? Log in!** to sign in to an existing account. Click **Create an account in 30 seconds** to register a new account.

① **NOTE:** If you select **Create an account in 30 seconds** you are creating an account for you (the guardian) and not the student at this point. Registering your account will not register you for the trip.



- 3 On the add an applicant page, click **No** to indicate that you aren't registering yourself for this trip.
- 4 Enter your child's information.
- 5 If you are not the legal guardian, click **Change Guardian** and enter the new information.

Trip Management for Team Leaders

When finished, click Add 'Em!.

Who is Jimmy's Legal Guardian?

They will need to give consent and possibly fulfill other requirements for Jimmy.

Guardian's Name?

First name Last name

Guardian's Email address?

This is the email of the guardian, cannot be the same as the applicant.

Guardian's Phone

Guardian's Gender

Male Female

[Back to Available Guardian\(s\)](#)

[← Cancel](#) [ADD 'EM!](#)

- To add another student, click **Add Another Person** and repeat the previous steps. Once complete, click **Yep, that's everybody!**.

Jimmy Anderson [REMOVE](#)

[+ ADD ANOTHER PERSON](#)

Ready to move onto the next step?
You'll be registering 1 person

[YEP, THAT'S EVERYBODY!](#)

- In the Requirements page, complete the application and resolve any pre-registration requirements. You can also send these registration requirements to your student for them to complete. Click **Continue** to move to the next step.

Trip Management for Team Leaders

- 8 Select your payment commitment on the Payment Commitment page, and click **Continue to Final Step**.

NOTE: You are not required to pay for your student. Click the check box for the \$0.00 deposit to have your student pay for the trip.

Almost done! What are you going to pay today?

The application fee is required for everyone that you are registering today

Have a coupon code?

- 9 If you aren't paying for your student, enter your contact information. If you are paying for your student, fill out your billing and payment information.
- 10 Click **Submit Application**.

Result

When payment information has been successfully processed, you will see the completed screen and a button labeled **My Events**. You have registered a student for an event.

Register for an Event with Team Member Pricing

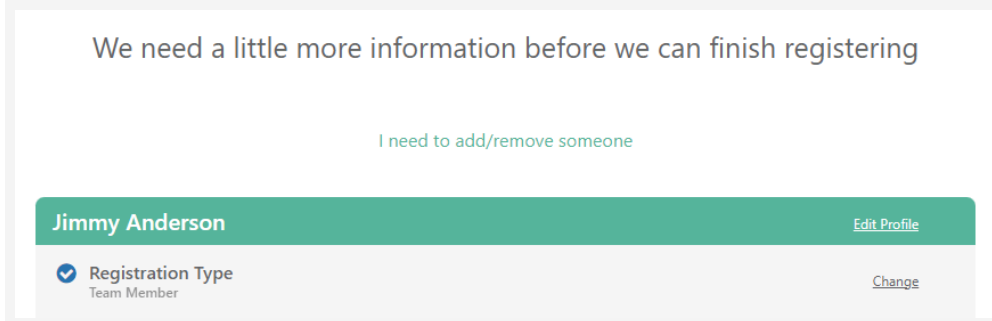
Some events may offer different registration costs depending on the team member type applying for the trip.

Context

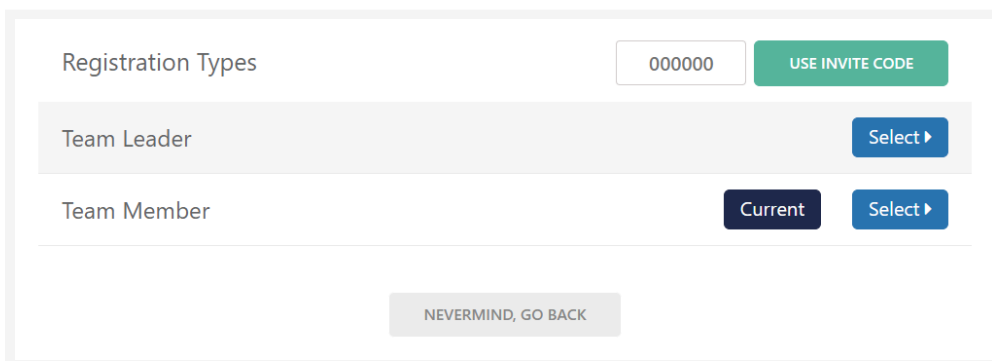
An event may have team member pricing to provide certain discounts based on the type of team member, such as waiving the registration fee for volunteers or discounting the registration fee for trip leaders.

Procedure

- 1 Go to the event registration page and click **Apply Today!**.
- 2 To register yourself for the trip, select **Yes** and your information appears. To register someone else, select **No**, enter the other applicant's information, and click **Add 'em!**.
- 3 On the **Who's Going?** screen, click **Yep, that's everybody!**.
- 4 In the Registration Type line, click **Change** to select the type of registration you need to complete.



- 5 To select the proper team member pricing, click **Select** next to the team member type you are going to be on this trip.



Trip Management for Team Leaders

- 6 If applicable, complete any additional application questions, prerequisites, requirements, and payment for that team member type.
- 7 Click **Submit Application**.

Add Participants to an Existing Registration

Add participants to an active event registration, making it a group registration.

Before you begin

- You must be a Go Method admin to do this.
- Your hosting organization must approve group registration.

Procedure

- 1 In the top menu, click **Events**→**My Events**.
- 2 Click the event.
- 3 Click the **Details** tab.
- 4 Under **Event Details**, find the event URL and click on the link.

EVENT DETAILS

Event ID: 6356

Event Type: Trip

Travel Dates: 3/4/23 – 3/11/23

Age Range: None

Allows Reserved Seating: No

Pay Structure: Donation

Allow Fundraising Past Goal Amount: No

Team Leaders Can Manage Funding: Yes

Hide Amounts From Team Members: No

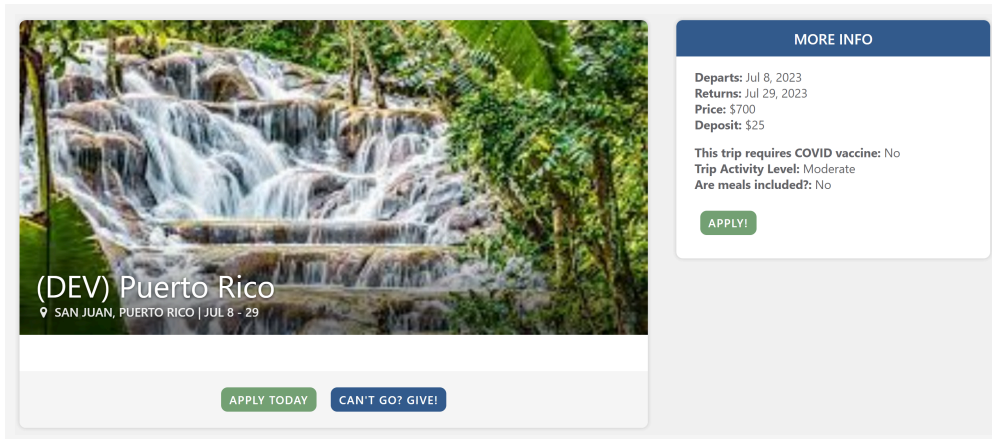
Hide Amounts From Team Leaders: No

Event Program: Missions Fund (Fund)

Event URL: <http://dev.fcsmnstry.io/3d/9R0YTSzVjy>

- 5 At the bottom of the page, click **Apply Today!** to begin registration.

Trip Management for Team Leaders



The screenshot shows a trip management interface. On the left, there is a large image of a waterfall in a lush green forest. Below the image, the text reads "(DEV) Puerto Rico" and "SAN JUAN, PUERTO RICO | JUL 8 - 29". At the bottom of this section are two buttons: "APPLY TODAY" and "CAN'T GO? GIVE!". On the right, there is a "MORE INFO" section with a blue header. Below the header, the following details are listed: "Departs: Jul 8, 2023", "Returns: Jul 29, 2023", "Price: \$700", and "Deposit: \$25". Below these details, it states: "This trip requires COVID vaccine: No", "Trip Activity Level: Moderate", and "Are meals included?: No". At the bottom of the "MORE INFO" section is a green "APPLY!" button.

- 6 Fill out the application and click **Add 'em** when done.
- 7 To add more people to the registration, click **add another person**.
- 8 Once you have finished adding members, click **Yep, that's everybody!**

NOTE: You can continue to add more people after you leave this screen.

Register a Group or Family

You can register more than one person at a time for the same event.

Context

NOTE: If you register more than one person at a time, you will become the group leader for this group (but not for the event).

Procedure

- 1 Click the event you want to apply to and click **Apply Today!**
- 2 To register yourself for the trip, select **Yes** and your information appears. To register someone else, select **No**, enter the other applicant's information, and click **Add 'em!**
- 3 To add another applicant, click **add another person**, enter their information, and click **Add 'em!**. Repeat this process for all the applicants you want to add.
- 4 When finished adding people, click **Yep, that's everybody!**
- 5 If applicable, complete any additional prerequisites, payment commitments, and payment required.

NOTE: You do not have to complete prerequisites, requirements, and payments for the entire group you're registering. Your group members can do that themselves.

- 6 Click **Submit Application**.

Result

You and your group are registered for the event. The group members you added will receive an email confirming registration and a link for them to complete any requirements and payments.

View Group-Registered Participants

If your trip allows groups, you can view your participants by their groups.

Before you begin

- You must be a Go Method admin or a trip leader to do this.
- Your hosting organization must approve group registration.

Context

Participants that were registered as part of a group are organized under the name of the person who registered them.

Procedure

- 1 Go to **Events** → **My Events**.
- 2 Click on the event whose participants you want to view.
- 3 On the left menu, click **Team Members** → **View Team Members**.
- 4 View your list of participants. Participants that were registered as a group are grouped by the name of the person that registered them. To view the entire group, click **View Group**.

Dani's Group View Group ▶

Participant	Registered By	Progress	\$ Raised	\$ Needed
Katheryn Doe Team Member	Dani Robertshaw	● ● ● ✓	\$5.00	\$70.00
Oliver Smith Team Member	Dani Robertshaw	● ● ● ✓	\$5.00	\$70.00

TOTAL GROUP FUNDING 7% FUNDED

REQUIREMENTS COMPLETED 33% COMPLETE

FUNDING NEEDED \$140.00

SEARCH BY NAME ACTIONS ⌵

Group Member	Requirements	\$ Raised	\$ Needed
Katheryn Doe Team Member	● ● ●	\$5.00	\$70.00
Oliver Smith Team Member	● ● ●	\$5.00	\$70.00

Result

In the group's participant page, you'll see the name of the group members, where they are at in the application and requirement process, how much money they have raised, and how much money they still need to raise.

Manage Trip Leaders and Participants

Invite New Trip Leaders

Invite a new person to create a Go Method login and become a trip leader.

Before you begin

- You must be a Go Method admin to do this.

Procedure

- 1 Go to **Events**→**My Events**.
- 2 Select the event you want to add new trip leaders to.
- 3 On the left menu, click **Team Members**→**View Team Members**.
- 4 At the top right, click **Actions**→**Add Member**.
- 5 Search for the participant to make sure they don't have an existing account.
- 6 If your participant doesn't appear in the search results, click **Invite A New Person**.
- 7 Enter the person's name and email, select whether this person is responsible for fund raising, and select the Team Member Type from the drop-down list. You can also add a personal message to your invite.
- 8 Click **Invite**.

Trip Management for Team Leaders

Invite a new team member!

New team members will receive an email inviting them to sign up.

Is the team member responsible for fund raising? YES NO
Team Member Type

Add a personal message to the invite (optional)

Result

Go Method will send an invite email to the email you entered for the person. Once they create an account, they will be added as a trip leader to the event.

Add Existing Trip Leaders to an Event

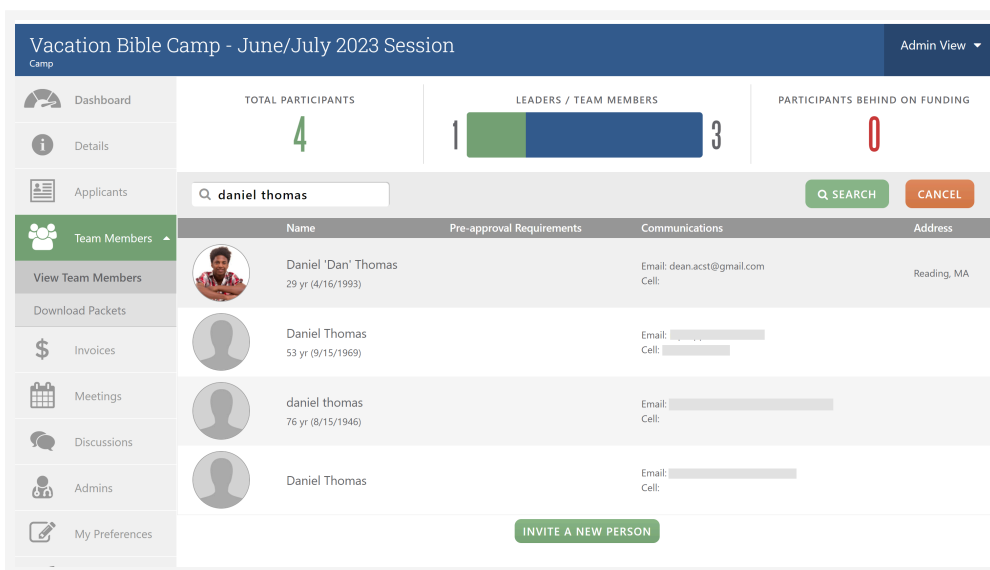
Add a trip leader that already has an account in Go Method to an event.

Before you begin

- The participant must have a previously existing account.
- You must be a Go Method admin to do this.

Procedure

- 1 In the top menu, click **Events**→**My Events**.
- 2 Select the event you want to add trip leaders to.
- 3 On the left menu, click **Team Members**→**View Team Members**.
- 4 At the top right, click **Actions**→**Add Member**.
- 5 Search for your participant by last name in the search field. If they have an existing account, they will appear in the results list.



- 6 If the person needs to be responsible for raising funds to pay for their event, toggle **Yes**; otherwise choose **No**. Click **Add** to add them to the event.
- 7 Once complete, click **Save Changes**.

Trip Management for Team Leaders

Add Member

Is the team member responsible for fund raising? YES NO

Team Member Type

Team Leader (Leader) ▼

Add a New Participant to an Event

Invite a new Go Method participant directly to the trip from within the trip.

Before you begin

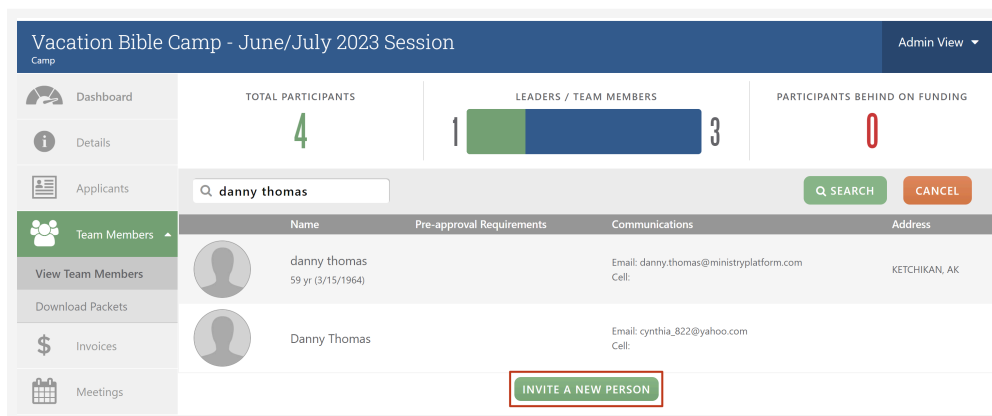
- You must be a Go Method admin or a trip leader to do this.

Context

⚠ CAUTION: Manually adding participants bypasses the application process and deposit requirement for trips.

Procedure

- 1 Go to **Events** → **My Events**.
- 2 Click on the event you want to add the participant to.
- 3 On the left menu, click **Team Members** → **View Team Members**.
- 4 Click **Actions** → **Add member**.
- 5 Search for the participant. If the participant doesn't appear in your search results, they do not have an account yet.
- 6 Click **Invite a New Person**.



- 7 Enter the invitee's **First Name**, **Last Name**, and **Email** in the corresponding fields.
- 8 Determine whether the new participant is responsible for their own fundraising by clicking **Yes** or **No**.
- 9 Select the team member type from the drop-down list.
- 10 **Optional:**
Include a personal message to the new participant.

11 Click Invite.

Invite a new team member!

New team members will receive an email inviting them to sign up.

Is the team member responsible for fund raising? YES NO
Team Member Type

Add a personal message to the invite (optional)

Result

The invitee will receive an email prompting them to create an account and join your trip.

Add an Existing Participant to a Trip

Invite an existing Go Method participant directly to your trip from within the trip.

Before you begin

- You must be a Go Method admin or a trip leader to do this.

Context

⚠ CAUTION: Manually adding participants bypasses the application process and deposit requirement for trips.

Procedure

- 1 Go to **Events** → **My Events**.
- 2 Click the event you want to add the participant to.
- 3 On the left menu, click **Team Members** → **View Team Members**.
- 4 Click **Actions** → **Add member**.
- 5 Enter the participant name and click **Search**. If they have an existing account, they will appear in the results list.
- 6 Click the participant.
- 7 Assign the participant basic permissions for this trip.
 - a Select whether the participant is responsible for their own fundraising by clicking **Yes** or **No**.
 - b Select the participant team member type from the drop-down list.
- 8 Click **Save Changes**.

Trip Management for Team Leaders

Add Member

Is the team member responsible for fund raising? YES NO

Team Member Type

Team Member ▼

Result

The participant has now been added to the trip.

Remove a Participant from an Event

Remove a participant from a trip so they can no longer access the trip or receive information regarding the trip.

Before you begin

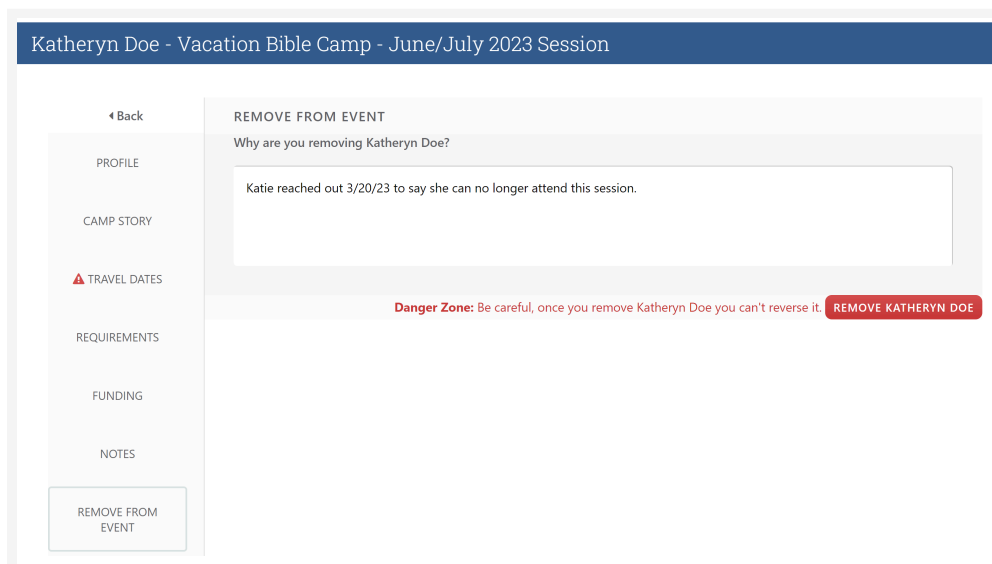
- You must be a Go Method admin or a trip leader to do this.

Context

CAUTION: Once you remove a participant, you cannot add him or her back.

Procedure

- 1 In the top menu, click **Events**→**My Events**.
- 2 Select the event you want to update.
- 3 On the left menu, click **Team Members**→**View Team Members**.
- 4 Select the participant you want to remove from the event.
- 5 At the bottom of the left menu, click **Remove From Trip**.
- 6 Enter any notes or details regarding the removal of the participant.
- 7 Click **Remove [team member]**.



- 8 To confirm, click **Yes, Remove [team member]**.

Result

The participant can no longer access information regarding the trip.

Promote a Participant to a Trip Leader

Trip Leaders can host discussions, organize meetings, and organize group involvement for events.

Before you begin


- You must be a Go Method admin or a trip leader to do this.

Context

You can choose to promote a participant to a trip leader. This gives the the promoted participant the permissions associated with the trip leader role.

Procedure

- 1 In the top menu, click **Events**→**My Events**.
- 2 Select an event. The event's dashboard displays.
- 3 On the left menu, click **Team Members**→**View Team Members**.
- 4 Select a participant to promote. The participant profile displays.
- 5 On the right, locate *Current Member Type* and click **Change**. A new window displays.



Current Member Type: Team Member | **Change**
Group: Add to Group
Public Invoice URL: <http://dev.fcsmnstry.io/3d/h8SCrs93pN>

- 6 In the drop-down menu, click **Team Leader**.
- 7 Click **Save Changes**.

Book Flights

Book Flights with Go Method

Go Method partners with both AFC Travel and High Point Travel to offer easy and convenient ways to get assistance while booking travel for your mission trips.

A Go Method admin must set up one of the flight integrations. Once integrated, you can view detailed flight information inside each trip, so your participants can review all their travel information for their mission trip.

Book Flights with AFC Travel

Go Method partners with AFC Travel to offer easy and convenient ways to get assistance while booking travel for your mission trips. Your admin can set up the integration. Once integrated with [AFC Travel](#), detailed flight information is available inside each trip, making it easy for all your participants to get the travel information they need.

Add an Existing AFC Travel Trip ID

Add an existing AFC Travel trip ID to link your AFC Travel flight information. If anything changes with your flight, you can see those changes right in Go Method.

Before you begin

- You must be a Go Method admin or a trip leader to do this.

Context

A travel trip ID is a 12-digit numeric code that can be found on the itinerary of a traveler's trip. It is a unique identifier for the trip and may be requested by airlines when checking in at the airport counter or kiosk. On the other hand, a reservation code is a six-character, alphabetical code that airlines may ask for when checking in at the airport counter or kiosk.

Procedure

- 1 Go to Events → My Events.
- 2 Click the event you want to add the flight information to.
- 3 Click the Flight Details tab.
- 4 Next to **Would you like to book travel with AFC Travel?**, click **Yes**.
- 5 Next to **Do you already have a trip ID from AFC Travel?**, click **Yes**.
- 6 Enter the AFC Travel Trip ID in the corresponding field.
- 7 Click **Save Changes**.

The screenshot shows a web interface with a sidebar on the left containing navigation items: Dashboard, Details, Applicants, Team Members, Flight Details (highlighted), Insurance, Meetings, Discussions, Admins, My Preferences, and Status Launched. The main content area has a header explaining the partnership with AFC Travel. Below this are two questionnaires: 'WOULD YOU LIKE TO BOOK TRAVEL WITH AFC TRAVEL?' and 'DO YOU BOTH ALREADY HAVE A TRIP ID FROM AFC TRAVEL?'. Each has 'NO' and 'YES' buttons, with 'YES' selected. A text input field labeled 'AFC TRAVEL TRIP ID' contains the text 'TRIP ID'. A 'SAVE CHANGES' button is at the bottom right. A note on the right explains the AFC TRAVEL ID.

Go Method partners with AFC Travel in order to offer easy and convenient ways to get assistance while booking travel for your mission trips. AFC Travel works with you and the airlines to offer quantity discount airline tickets for your missionaries.

Answer a few questions below to start integrating AFC Travel with Go Method or call 952.886.7676 or email staff@afctravel.com to request a quote. After receiving the AFC Trip ID, add it to Go Method to see detailed information about the flight itineraries.

WOULD YOU LIKE TO BOOK TRAVEL WITH AFC TRAVEL? NO YES

DO YOU ALREADY HAVE A TRIP ID FROM AFC TRAVEL? NO YES

AFC TRAVEL TRIP ID

TRIP ID

AFC TRAVEL ID
If you have talked with AFC Travel about this trip, it is possible they have supplied you with a Trip ID

SAVE CHANGES

Result

Your AFC Travel details now appears under the Flight Details tab of your trip.

Assign Participants to a Flight Contract

Assign participants to one or more flight quotes. You can modify the list of selected participants until you submit the final list. After you submit the final list, you can't change the list of participants.

Before you begin

- You must be a Go Method admin or a trip leader to do this.
- You must have a flight quote or contract associated with the trip.

Context

NOTE: Assigning participants to a flight contract doesn't submit the traveler's list to High Point Travel. You must submit a final traveler's list to submit your finalized list of travelers for a flight.

Procedure

- 1 Go to Events → My Events.
- 2 Click on the event.
- 3 Click the Flight Details tab.
- 4 Scroll to the contract you want to assign participants to and click the Traveler's Assigned heading.

Contract #232768

Status	Active
Required Traveler Info	Full passport
Validating Carrier	AV
Fare Type	Group

Sat, Jun 24, 2023 - Sat, Jul 1, 2023

Not Submitted
The traveler list has **NOT** been submitted to High Point. Final travelers list is **due on Mon, May 15, 2023**. Once submitted, you will no longer be able to update it in Go Method.

SUBMIT FINAL TRAVELER LIST

4 of 15 Travelers Assigned

- 5 In the Travelers section, click Manage Travelers.
- 6 Click the participants you want to assign to the flight contract.

NOTE: If a participant is missing required information, you can't select them from the list. You can't add them to the contract until the missing information is added.

- 7 Click Save Changes.

Result

Everyone you selected will be able to see this flight's details in Go Method, even if you haven't submitted the final traveler's list yet.

Download a Traveler's List

For pending quotes or trips with less than ten participants, you can download a traveler's list to email to the appropriate flight integration company, AFC Travel or High Point Travel.

Before you begin

- You must be a Go Method admin or a trip leader to do this.

Procedure

- 1 Go to Events→My Events.
- 2 Click on the event that you want to download a traveler's list from.
- 3 Click the Flight Details tab.
- 4 Click Generate Travelers List.
- 5 Select the participants you want to include from the Temporary List of Travelers.
- 6 Click Download.

Result

You can download and email this file to your flight representative.

View Flight Itinerary Details

Once you assign participants to a quote or contract, they can view their flight information in the trip.

Procedure

- 1 Go to Events→My Events.
- 2 Click on an event.
- 3 Click the Flight Details tab.
- 4 Scroll to the itineraries section and view the flight itineraries.

Book Flights with High Point Travel

Go Method partners with High Point Travel to offer easy and convenient ways to get assistance while booking travel for your mission trips. Once integrated with High Point Travel, detailed flight information is available inside each trip, making it easy for all your participants to get the travel information they need.

Request a Flight Quote

Contact High Point Travel through Go Method to request a quote for how much the flights cost.

Before you begin

- You must be a Go Method admin or a trip leader to do this.

Procedure

- 1 Go to **Events**→**My Events**.
- 2 Click the event you want to request a flight quote for.
- 3 Click the **Flight Details** tab.
- 4 In the *Request a new High Point Travel quote* section, click **Request a New Quote**.
- 5 Enter your information and the quote details.

NOTE: To request more than one quote at a time, click **Add Another Quote to this Trip** and enter the quote details for any additional quotes.

- 6 Click **Send Request**.

Result

Go Method sends your trip's details and travel needs directly to High Point Travel. High Point Travel will contact you, and once your quotes are available they will automatically display in the Flight Details tab.

Add an Existing High Point Travel Quote or Itinerary

Add a flight quote or itinerary to your trip to view flight details and information directly in Go Method.

Before you begin

- You must be a Go Method admin or a trip leader to do this.

Procedure

- 1 Go to Events → My Events.
- 2 Click the event you want to add flight information to.
- 3 Click the Flight Details tab.
- 4 In the *Add an existing High Point Travel or itinerary* section, enter the High Point Travel Trip ID and High Point Travel Organization ID in the corresponding fields.
- 5 Click Add High Point Travel Trip.

Result

The High Point Travel quotes and/or contracts will display under the Flight Details tab.

Next steps

After adding an existing High Point Travel quote or itinerary, don't forget to assign participants to the contract.

Assign Participants to a Flight Contract

Assign participants to one or more flight quotes. You can modify the list of selected participants until you submit the final list. After you submit the final list, you can't change the list of participants.

Before you begin

- You must be a Go Method admin or a trip leader to do this.
- You must have a flight quote or contract associated with the trip.

Context

NOTE: Assigning participants to a flight contract doesn't submit the traveler's list to High Point Travel. You must submit a final traveler's list to submit your finalized list of travelers for a flight.

Procedure

- 1 Go to Events → My Events.
- 2 Click on the event.
- 3 Click the Flight Details tab.
- 4 Scroll to the contract you want to assign participants to and click the Traveler's Assigned heading.

Contract #232768

Status	Active
Required Traveler Info	Full passport
Validating Carrier	AV
Fare Type	Group

Sat, Jun 24, 2023 - Sat, Jul 1, 2023

Not Submitted
The traveler list has **NOT** been submitted to High Point. Final travelers list is **due on Mon, May 15, 2023**. Once submitted, you will no longer be able to update it in Go Method.

SUBMIT FINAL TRAVELER LIST

4 of 15 Travelers Assigned

- 5 In the Travelers section, click Manage Travelers.
- 6 Click the participants you want to assign to the flight contract.

NOTE: If a participant is missing required information, you can't select them from the list. You can't add them to the contract until the missing information is added.

- 7 Click Save Changes.

Result

Everyone you selected will be able to see this flight's details in Go Method, even if you haven't submitted the final traveler's list yet.

Submit a Final Traveler List

Send your finalized list of travelers for a flight contract directly to High Point Travel.

Before you begin

- You must be a Go Method admin or a trip leader to do this.
- You must have a flight quote or contract associated with the trip.

Context

⚠ **WARNING:** Once you submit a final traveler's list, you can't make any changes to your traveler's list for that flight contract.

Procedure

- 1 Go to Events→My Events.
- 2 Click the event whose traveler list you want to submit.
- 3 Click the **Flight Details** tab.
- 4 In the appropriate flight contract, click **Submit Final Traveler List**.
- 5 Click **Yes, Submit and Lock In**.

Result

A message displays that your final list of travelers has been submitted and you can't make any changes to the flight travelers list.

Download a Traveler's List

For pending quotes or trips with less than ten participants, you can download a traveler's list to email to the appropriate flight integration company, AFC Travel or High Point Travel.

Before you begin

- You must be a Go Method admin or a trip leader to do this.

Procedure

- 1 Go to **Events** → **My Events**.
- 2 Click on the event that you want to download a traveler's list from.
- 3 Click the **Flight Details** tab.
- 4 Click **Generate Travelers List**.
- 5 Select the participants you want to include from the **Temporary List of Travelers**.
- 6 Click **Download**.

Result

You can download and email this file to your flight representative.

View Flight Itinerary Details

Once you assign participants to a quote or contract, they can view their flight information in the trip.

Procedure

- 1 Go to **Events** → **My Events**.
- 2 Click on an event.
- 3 Click the **Flight Details** tab.
- 4 Scroll to the itineraries section and view the flight itineraries.

Team Communication

Discussions

Engage with your trip's participants with discussion posts.

If you enable discussions for a trip, you and your trip's participants can create discussion posts to ask questions, share information, and engage with your team. Go Method admins, trip leaders, and participants can all comment on discussion posts and create, edit, and delete their own discussions. Only admins and trip leaders can delete other people's discussion posts.

NOTE: Enable discussions when you create a trip or later under the trip's Details tab.

Create Discussions

Create discussion boards to communicate with participants about topics or events.

Before you begin

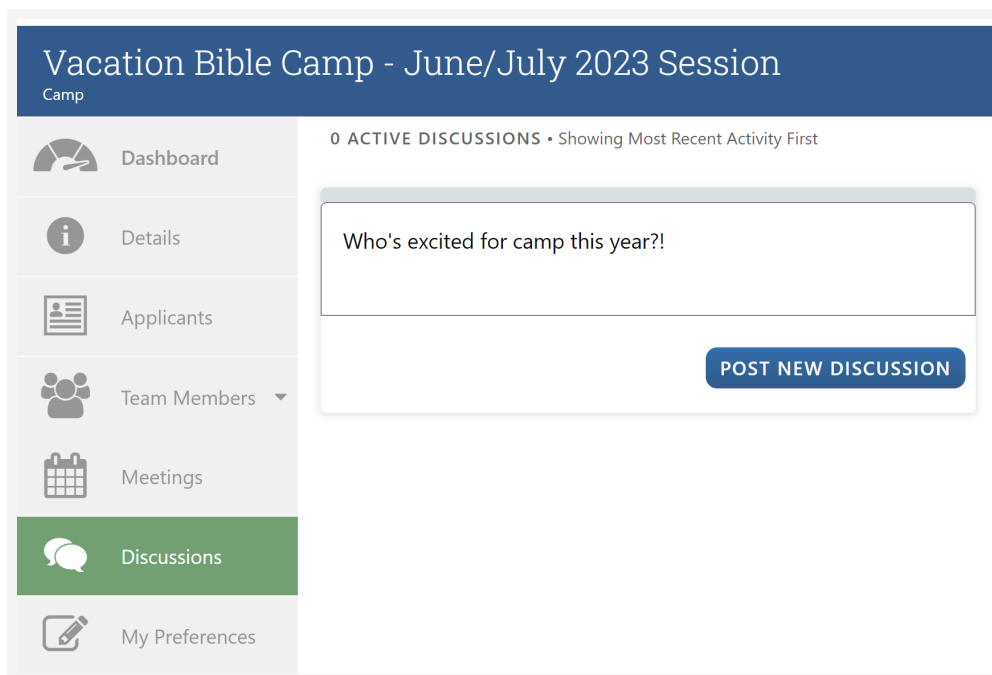
- You must have discussions enabled for your event to do this.

Context

The discussions feature is useful for communicating and sharing ideas with your team. Create new discussions to begin a new topic and engage with your team.

Procedure

- 1 In the top menu, click **Events**→**My Events**..
- 2 Select an event.
- 3 Click the **Discussions** tab.
- 4 Enter your discussion into the **Start a new discussion** box.
- 5 Once complete, click **Post New Discussion**.



Result

The trip's participants can now comment on the discussion thread.


Delete Discussions

Remove a discussion post to keep your discussions tab clean keep your data tidy.

Before you begin

- You must be a Go Method admin or a trip leader to do this.

Procedure

- 1 In the top menu, click **Events**→**My Events**.
- 2 Select an event to delete discussions from.
- 3 Click the **Discussions** tab.
- 4 Find the discussion board you want to delete and click .
- 5 To delete the discussion board, click **Yes, Remove**.


Edit Discussions

We all make mistakes when writing. If you posted a discussion that requires revision, just edit it.


Before you begin

- You must be the person who posted the original discussion post to edit it.

Context

 **NOTE:** You can only edit discussions that you posted.

Procedure

- 1 Go to **Events**→**My Events**.
- 2 Click on the event whose discussion you want to edit.
- 3 Click the **Discussions** tab.
- 4 Click the  next to the discussion post you'd like to edit.
- 5 Make your edits. When finished, press the **Enter** key to post the edited discussion.

Send a Group Email to the Team

Send an email to all the participants on your trip.

Before you begin

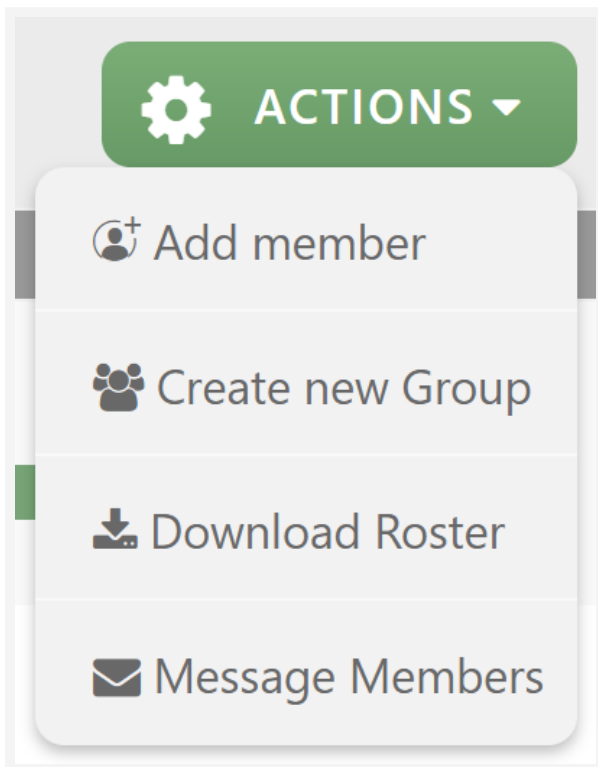
- You must be a Go Method admin or a trip leader to do this.

Context

Trip Leaders can send group emails to notify participants of changes, updates, or to share helpful resources.

Procedure

- 1 In the top menu, click **Events**→**My Events**..
- 2 Select an event.
- 3 On the left menu, click **Team Members**→**View Team Members**.
- 4 On the right, click **Actions**→**Message Members**.



- 5 Enter the **subject** and write your **message**.
- 6 Once complete, click **Send**.

Trip Management for Team Leaders

Result

When a member of the team replies to a group email, replies are delivered to the email address you entered for your Go Method account.