

# Church Dashboard User Guide

*Updated: 07/24/2018*

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## **CHURCH DASHBOARD INTRODUCTION**

The Church Dashboard is a web-based feature that allows local churches to update the information for their church both in the conference database and on our conference website. This includes items such as Worship Service times, directions to the church, and events being held by the church.

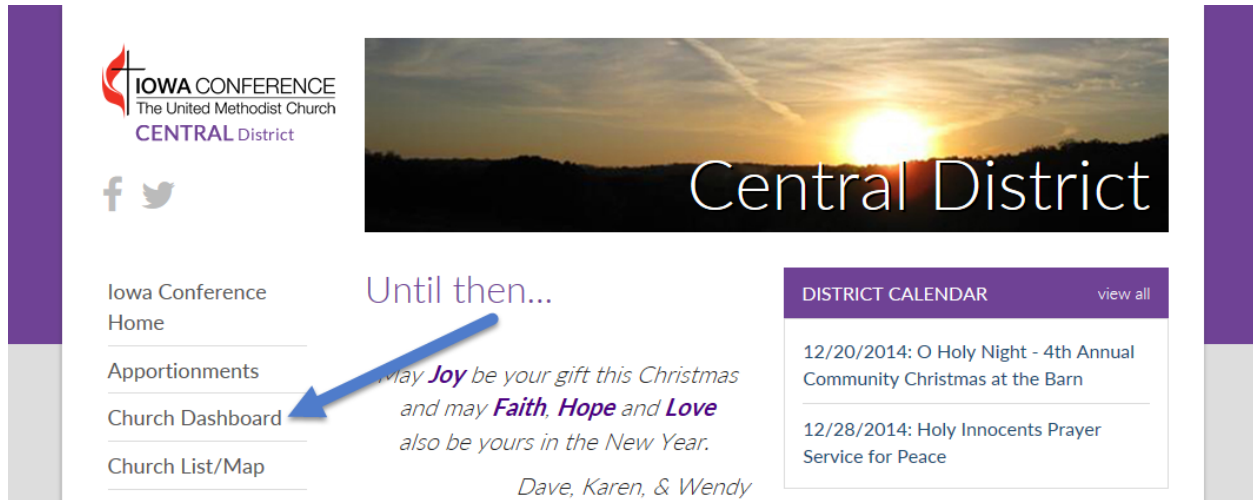
The pages that follow take you through a step-by-step process on how to use the church dashboard. If there are questions regarding the church dashboard that are not answered in this document, please contact Roland Minshall ([roland.minshall@iaumc.org](mailto:roland.minshall@iaumc.org)) in the conference office.

# LOGGING IN TO THE CHURCH DASHBOARD

There are two ways to access the login screen for the Local church dashboard.

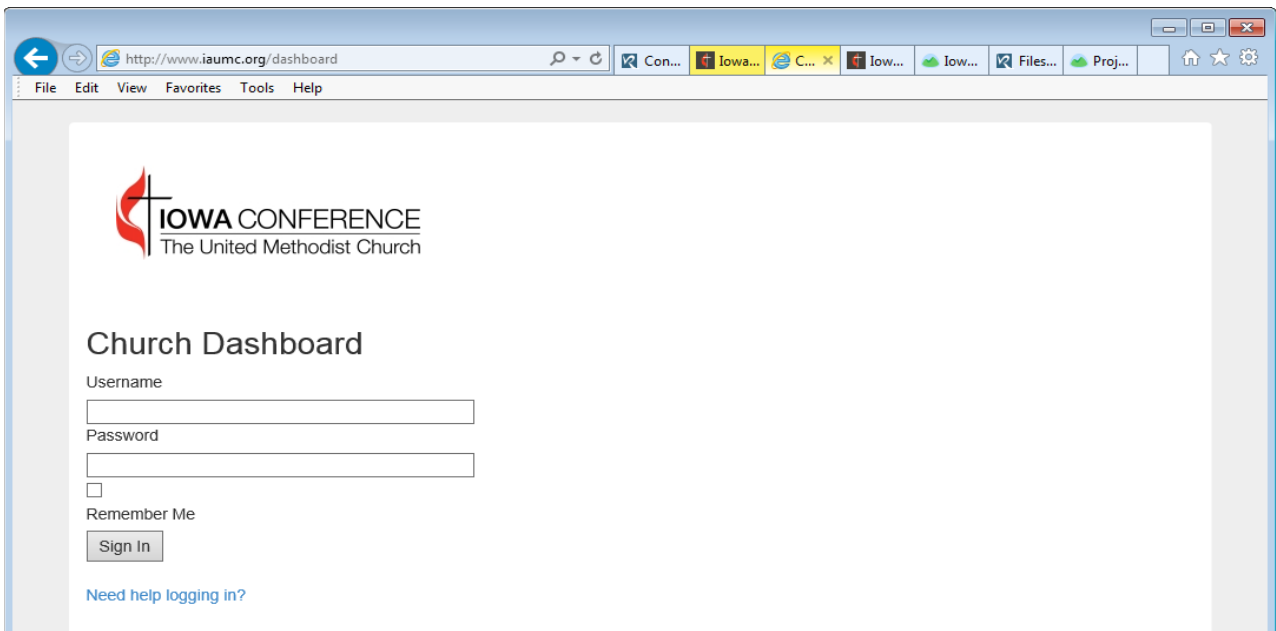
## Option 1

Visit your district's website (accessible through [www.iaumc.org](http://www.iaumc.org)) and click on "Church Dashboard" on the left-hand side of the screen.

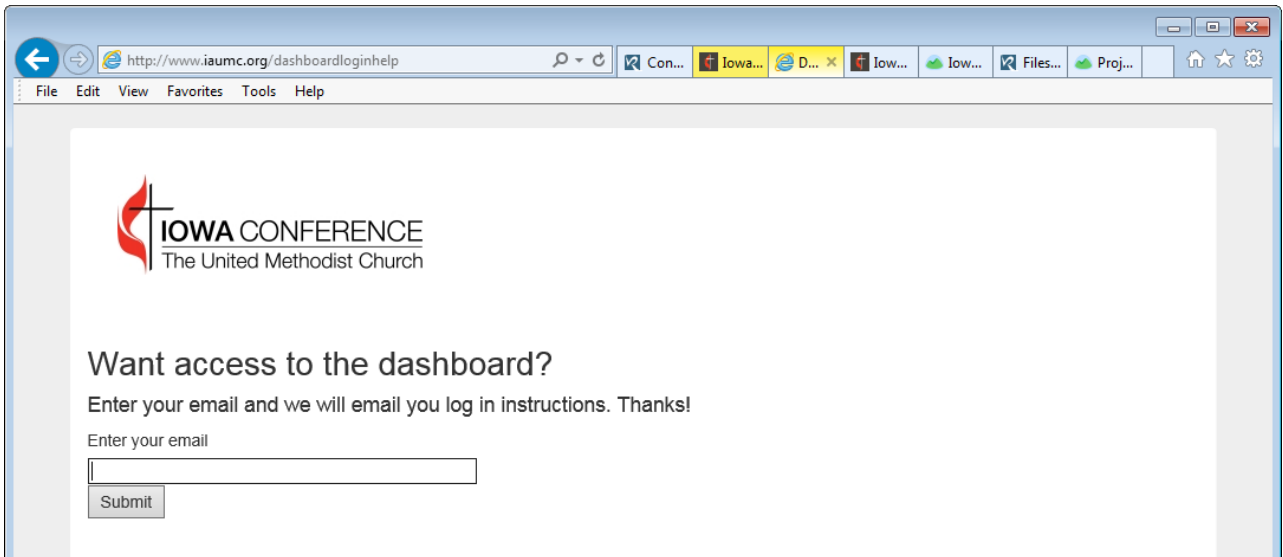


## Option 2

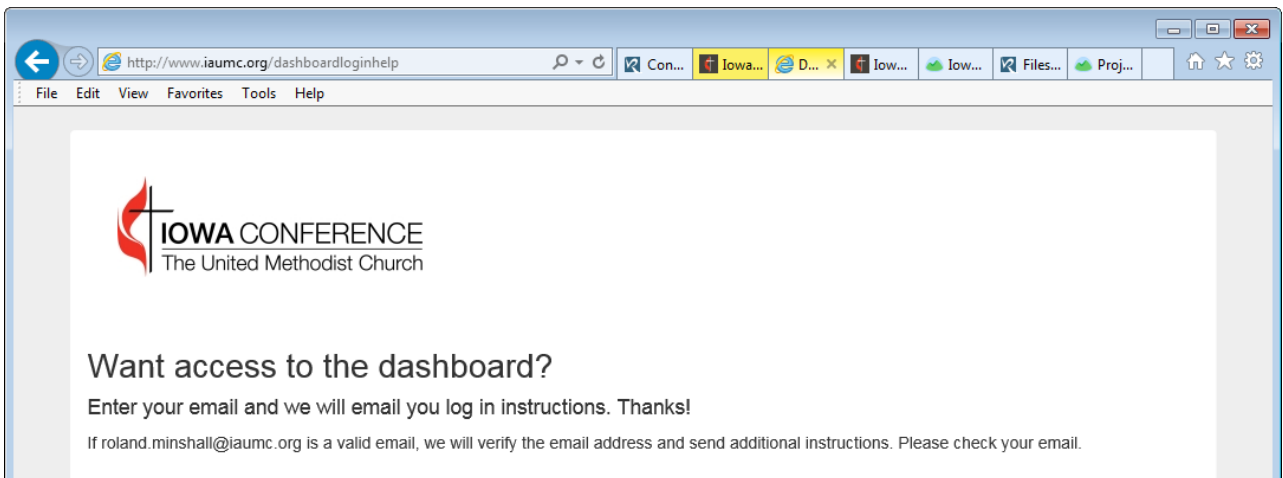
Type <http://www.iaumc.org/dashboard> into the address bar of your web browser and go directly to the following screen.



Log in using the username and password for your church. If you cannot remember your login information, please click on the "Need help logging in?" link and you will be presented with the following screen:

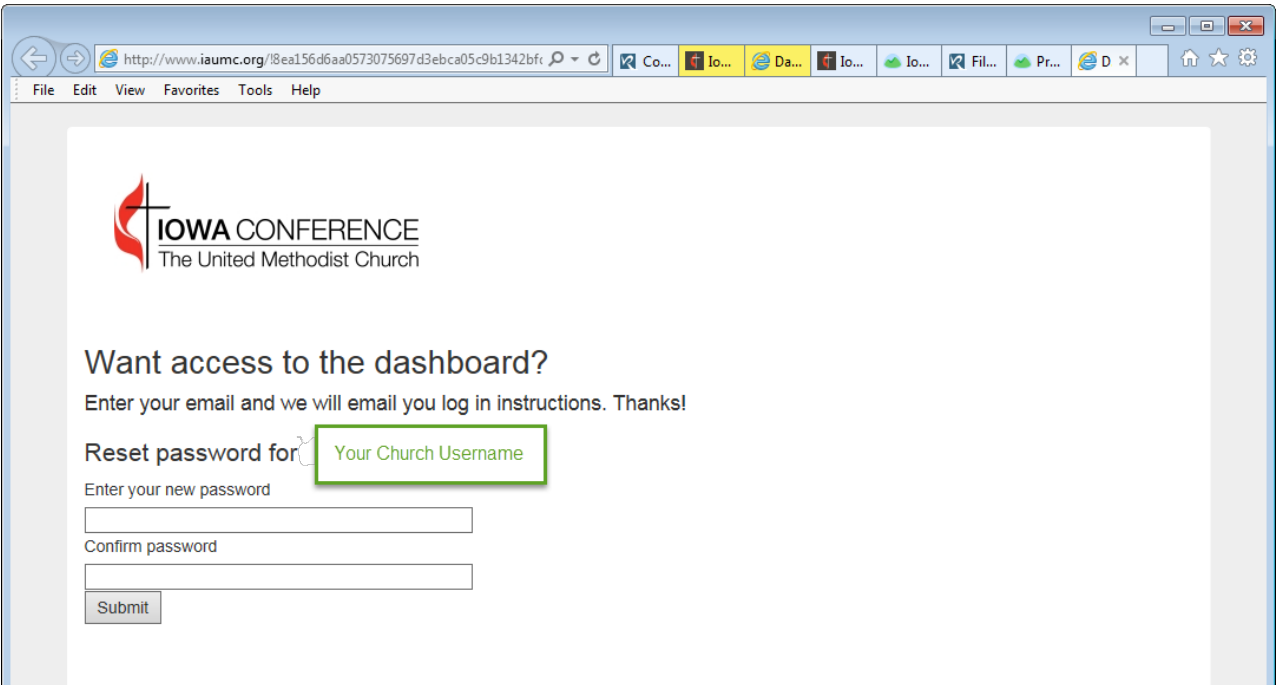


Enter your **church's** e-mail address and click "Submit". The church email that you use here **must match** the email address that is listed in our database for your church. You will see the following screen.



If the email address you entered is the correct email address listed for your church, you will receive an email with a link to change your password.

Click on the link and you will be prompted to enter your new password and then to confirm it. Your username will be in bold letters. In the example below, the username is "Your Church Username".



Once the password is accepted, you will need to go back to the login screen and enter the new information.

Once you have logged in, you will be presented with the home page of the church dashboard:



### Church Dashboard

Charge Conference and Other  
Forms

Church Information

Events

Login Information

Log-out

Test Church

## 'CHURCH DASHBOARD' HOME PAGE

The church dashboard home page has links that will take you to each section of the dashboard. This manual will cover each of the sections. The sections are as follows:

### **Charge Conference and Other Forms**

### **Church Information**

### **Events**

### **Login Information**

**Log Out** - *Clicking on the Log Out link will log you out of the system and return you to the Church Dashboard Login screen.*

**Church Dashboard**

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Waukee



## CHURCH INFORMATION

This area allows you to update the information for your church. Click on the “Church Information” link and the following screen will display with the information we currently have in the database for your church.

**Click** on the green “**Update**” button to make changes in any of the displayed fields. (See screen below).

**Church Dashboard**

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Waukee

Church Information



Update

Primary Image



Church SHORT Name

Waukee

Church FULL Name

Waukee UM Church

**IOWA CONFERENCE**  
The United Methodist Church

## Church Information

**Save**

Primary Image [add title ...](#)

waukee\_umc\_nqqr2qmm.jpg  
http://YourWebsite/files/tables/contacts/494407/fields/primaryimage/8c2f140b158e44c19d866ef7f92336  
**Remove**

**Browse**

**- Name Fields**

**- Email and Phones**

Email Address

Business Phone

Church Fax

**To upload a Primary Image** (current picture of your church), click on the “Browse” button and navigate to the picture located on your computer. Click on the file name to highlight it and then click “open”. This will upload your picture to the website.

When making changes to the contact information for your church, entries must be made using CAPITAL LETTERS and no punctuation. (The only exception is the email address.) Phone numbers should be entered in the following format (xxx) xxx-xxxx. It is very important that you **do not** put words in the phone number field such as “call first”. Do not enter words in the phone number field even if you are indicating an extension. Just enter the phone number without the extension.

Please note: If you need to make a change to your Physical Address please contact a conference or district office with the desired update.

When you have finished updating the information for your church, **click on “SAVE”**. The following screen will display. Click “Return to Church Info”.

**IOWA CONFERENCE**  
The United Methodist Church

## Church Information

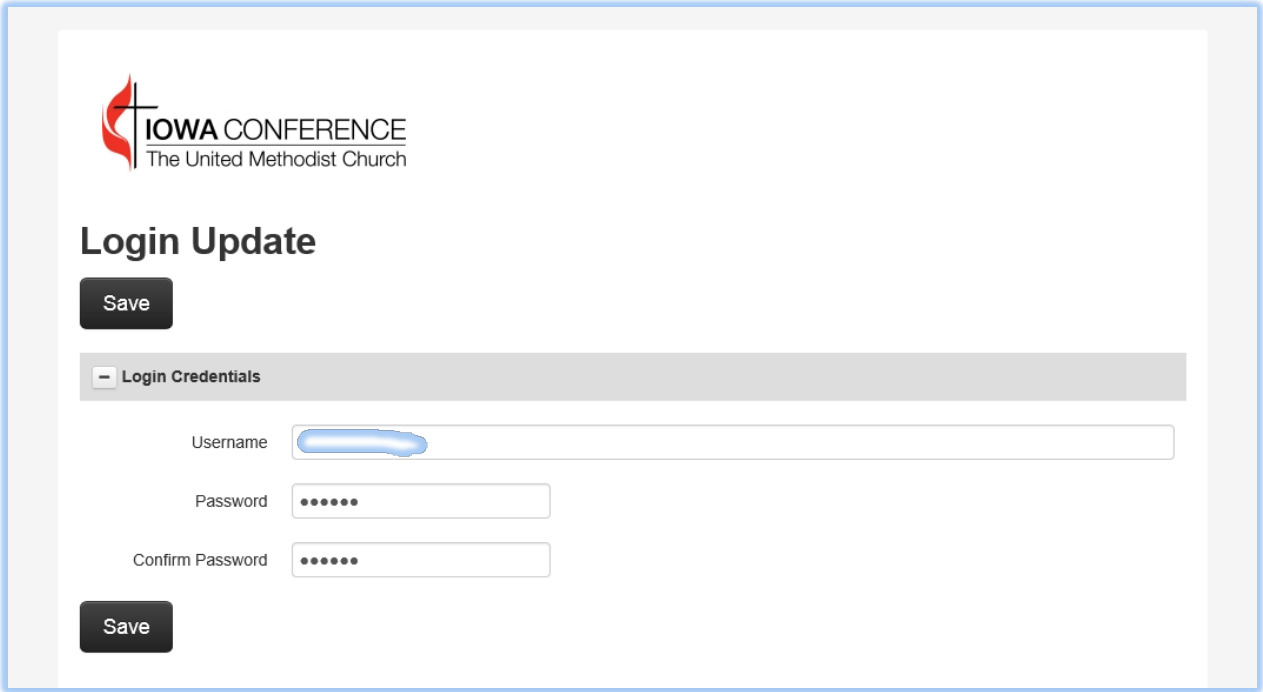
**Your change has been saved**

**Return to church info page**



# CHURCH LOGIN INFORMATION

This area is used to change the login information for your church. (This login is for the church, not an individual.) If more than one person at your church accesses this program, you will need to inform them of the change. Click on the "Update" button, and the following screen will appear.



The screenshot shows a web form titled "Login Update" for the Iowa Conference of The United Methodist Church. At the top left is the logo, which consists of a red cross with a flame-like shape on its left side, followed by the text "IOWA CONFERENCE" and "The United Methodist Church" below it. Below the logo is the heading "Login Update". There are two "Save" buttons: one above the form and one below it. The form itself is titled "Login Credentials" and contains three input fields: "Username" (with a blue highlight), "Password" (with six dots), and "Confirm Password" (with six dots).

Enter the new username that you want to use, enter the new password and then re-type the new password to confirm it. Click on "Save". Put this information in a safe place.

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## Test Church

### Events

Dec-01-2016 [Soup Dinner](#)

Dec-01-2016 [Soup Supper](#)

[Add New Event](#)

## Events

This selection allows you to enter events being held by your church. These events will then show on the Conference website calendar, along with the church detail page for your church under the district church lists.

To begin, **click on “Add New Event”**

## Submit an Event from Church

Save

Title

### Event Dates ▾

Start

End

Recurrence

### Event Details ▾

Calendar  ▾

Body

Church

Main Contact Name

Location Name

Address 1

Address 2

City

State  ▾

Email

External URL

Save

Enter as much of the information as you have available. Required fields include the Title, the Start Date, and the Body (description of the event). Make sure you select your church from the dropdown list of churches.

**Click Save when completed**

**Church Dashboard**

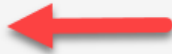
[Charge Conference  
and Other Forms](#)

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## Test Church

### Events

Dec-01-2016 Soup Dinner

Dec-01-2016 Soup Supper

[Add New Event](#)

You will be returned to the events screen with your newly added event showing.

To make changes to any event simply click on the name of the event to go to the update screen.



### Church Dashboard

[Charge Conference and Other Forms](#)



[Church Information](#)

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## Test Church

### Charge Conference and Other Forms

[NC District 2017 Charge Conference Reports \(Not Submitted\)](#)

[Click here for your current Leadership Worksheet](#)

## Charge Conference and Other Forms

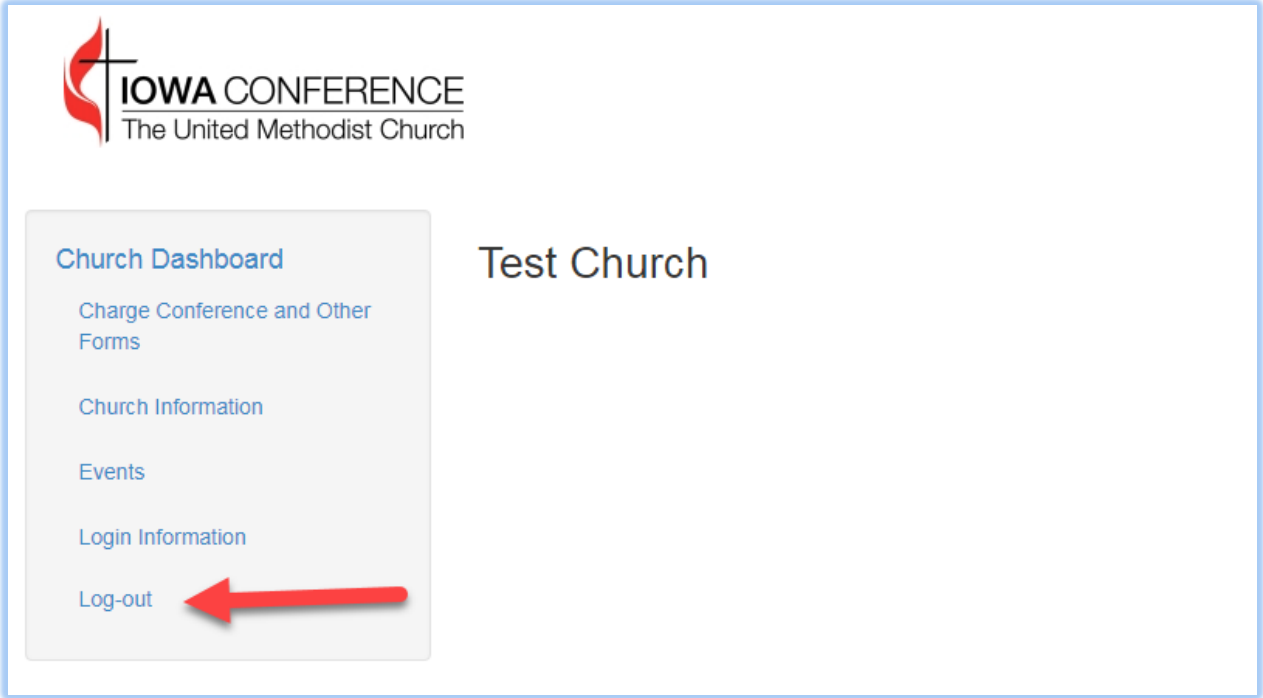
The Charge Conference and Other Forms link will take you to a screen which will contain links to various FormVites which have been sent to your church for Charge Conference Reports. Simply click the appropriate link for the forms you need to fill out.

Beginning in 2017 this will be the only method for accessing the Charge Conference Forms links.

You will also find a link to your Current Leadership Worksheet.

# LOG-OUT

After you are finished working in the Local dashboard, click on “Log-Out”.



You will be returned to the homepage of our conference website.