

USING THE CHURCH DASHBOARD

The Church Dashboard is used by each church to manage information about the church, parsonage, and church leadership.

3 ways to launch your Church Dashboard:

- Go to wpaumc.org/Dashboard
- Select the CHURCHES menu at the top of the WPAUMC Conference website (wpaumc.org) and select “Login - Church Dashboard” from the menu on the right
- Visit your District webpage on the Conference website and select “Church Dashboard Login” under “Important Links” on the left

Logging in:

1. The username is your church’s 5 or 6 digit (without leading zero) GCFA number
2. Enter your password – if you aren’t sure of your password, click on the “Need help logging in?” link or contact the District Office to have your password reset

Log-in to the Church Dashboard

Welcome to your new Church Dashboard

An explanation of the links on the left:

- **Church Information:** Allows you to update contact information for your church
- **Church Parsonage/ Church Profile:** Forms to complete that are used by the cabinet during the appointment season
- **Contacts:** A list of people in the conference database currently associated with your church - You can update their contact information
 - Don't worry if someone listed here is no longer associated with your church
- **Leaders:** A place for you to enter the leadership for your church
 - Make sure that each leader has correct contact information
- **Leaders (printable):** Print out a list of your leaders
- **Login info:** Allows you to change your password

Username
Password

Remember Me

Sign In

Need help logging in?

Click here to get automated help resetting your password

Church Dashboard
Church Information
Church Information (printable)
Church Parsonage
Church Parsonage (printable)
Church Profile
Church Profile (printable)
Contacts
Leaders
Leaders (printable)
Log-in Information
Log-out

Once logged in, you will see a menu down the left side showing the links used to edit and enter information about your church, parsonage and leaders.

- Use the links marked with “(printable)” to view & print reports
- Use the links *NOT* marked with (printable) to edit information and reports
 - **Church Information:** Allows you to update contact information for your church
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Updating Your Contacts in Your Church Dashboard

As a minimum, church contacts should have a first and last name, email address, mailing address and phone number. This information should be checked for accuracy at least once a year, especially for those assigned to leadership positions and as lay equalization.

The screenshot shows the 'U M Church' dashboard with a 'Contacts' section. The left sidebar has a menu with 'Contacts' circled in red. A red arrow points from the 'Contacts' menu item to the main table. The table has the following columns: Edit, Contact, Email, Phone, Mailing Address, and Not in my church. The table contains four rows of contact information, each with an 'Edit' button and a 'remove from my church' button.

Edit	Contact	Email	Phone	Mailing Address	Not in my church
Edit	D...	dla...@verizon.net	m... 412-263-7474	877... Ser...	remove from my church
Edit	K... B...	kdc...@comcast.net	m... 724-794-4542	40... Ton...	remove from my church
Edit	M... in	mc...@comcast.net	hc... 24-4542	40... Ton...	remove from my church
Edit	M... rd	ma...@hoo.com	m... 412-333-4548	41... Ton...	remove from my church

Click on “Contacts” to see a list of contacts associated with your church. The summary chart that appears can quickly show information that is missing or needs to be updated, as well as people who are no longer associated with your church.

- **If a person in your list is now deceased**, click the “Edit” button to the left of their name, scroll to the “Statuses” section at the bottom, click in the “Deceased” field to switch to “yes” and click the save button
- **If a person is no longer associated with your church**, click the “remove from my church” button to the right of the person
- **To edit a person’s information**, click “Edit” to the left of the contact’s name, make the necessary edits and click the “Save” button when finished. As a minimum, make sure email, phone number(s) and the mailing address are correct.
- There are some individuals you cannot edit, such as clergy. To make changes in these cases, contact your District Office.

Using the Church Dashboard to Update Your Church Leadership Assignments

Click on “Leaders” in menu on the left side of the Church Dashboard. If leaders were previously entered for your church, and they have an end date in the future or no end date, you will see them listed.

Add New Assignment					
Edit leader assignments here. To edit contact info go to this page .					
Action	Assignment (View required positions)	Person	Start Date	End Date	Class
Edit Assignment	A.) Administrative Board/Council Chair	B	01/01/2015	12/31/2017	
Edit Assignment	B.) SPR/PPR Chair	B	01/01/2015	12/31/2017	
Edit Assignment	C.) Treasurer	P	01/01/2007		
Edit Assignment	D.) Finance Chair	T	01/01/2015	12/31/2017	
Edit Assignment	F.) Lay Leader	K	01/01/2008		
Edit Assignment	G.) Lay Member to Annual Conference	M	01/01/2011	12/31/2018	

The following are the Leadership Assignments that can be assigned to people in your church:

- | | |
|--|--|
| A) Administrative Board/Council Chair | N) Young Adult Coordinator |
| B) SPR/PPR Chair | O) Youth Director |
| C) Treasurer | P) Communications |
| D) Finance Chair | Q) Missions Chair |
| E) Financial Secretary | R) Evangelism Chair |
| F) Lay Leader | S) Camping Advocate |
| G) Lay Member to Annual Conference | T) Christian Education |
| H) Alternate Lay Member to Annual Conference | U) Outreach Chair |
| HH) Church Historian | V) Nurture Chair |
| I) Trustee Chair | W) Witness Chair |
| J) Church Secretary | Ww) Worship Chair |
| K) UM Men President | X) Disaster Response |
| L) UM Women President | Y) Principal Delegate to District Conference |
| M) UM Youth President | Z) Reserve Delegate to District Conference |

Assigning/Changing Leadership Assignments

1. If the person you wish to enter is already listed along with the correct position and information, do nothing.
2. If the person is listed **but his/her assigned position is changing or has changed**, do the following.
 - o Click on “Edit Assignment” and fill in the correct end date for the currently assigned position and click “Save”
 - o **Continue to STEP 3 to add the new position**
3. If the person you wish to enter **is already listed with a correct position, but the person also needs to be added to an additional leadership position**, do the following.
 - o Scroll to the top of the page and click on big green “Add Position Assignment” button
 - o Scroll through your alphabetical list of church contacts to find the person you are looking for
 - o Click on the “Give assignment” button to the right of the person
 - o **Continue as outlined in the red framed box on the next page.**

4. If the person **does not appear in the list**, **FIRST CHECK TO SEE IF THE PERSON IS ALREADY IN DASHBOARD. (This is an important step to avoid duplication as the Dashboard database includes information for all of the WPA Conference!!)**
 - Scroll to the bottom of the page and click on “Add a New Person.”
 - Type the last name of the person in the search bar and press enter or click search
 - If the person you are looking for comes up in the search results, click on the “Give assignment to this person” button and **continue as outlined in the red framed box below**. If the person you are looking for does not come up in the search results, click on the “Add a brand new person to our database” button. After adding the person’s first and last name, as much information as you wish for the person, but be sure to enter the email, phone and complete mailing address. Click the “Save” button to save the person and then click on “Return to Church Contact.” Click on “Leaders” on the left and follow the steps under ITEM 3 above to add the person you just added to the database to a leadership assignment.

1. Enter the START and END dates. Leave END empty if the assignment is indefinite
2. Click the drop down arrow next to Position to assign the person to a position
3. Click on the “Save” button

The new person and position should now be included in your leadership list.

Notes:

- Address and other information for a person is updated by through the “Contact” menu
- To see your current or future leaders, select the “Leaders (printable)” menu – By clicking on the “Future Leaders” button at the top, you will see the leadership effective January 1 of **next** year
- Use the appropriate menu link – “Church Information,” “Church Parsonage,” and “Church Profile” – to update this information, which should be done at least once a year
- Use the appropriate menu link – “Church Information (printable)”, “Church Parsonage (printable)”, and “Church Profile (printable)” – to print this information
- Update your log-in password through the “Log-in Information” menu