

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

[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

Updating Your Contacts in Your Church Dashboard

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 “Status” section at the very 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.

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 displays the 'Contacts' section of a church dashboard. On the left is a sidebar with navigation options: Church Dashboard, Church Information, Church Information (printable), Church Parsonage, Church Parsonage (printable), Church Profile, Church Profile (printable), Contacts, Leaders, Leaders (printable), Log-in Information, and Log-out. The main content area is titled 'Contacts' and includes a search bar and two buttons: 'Add Contact' and 'Download Contacts'. Below these is a table with the following columns: Edit, Contact, Email, Phone, Mailing Address, and Not in my church. The table lists several contacts, with some fields obscured by blue hatched boxes. The contacts listed are Diane Bartley, Kim Benjamin, Mark Benjamin, Martha Bower, Barb Bower, Jim Canfield, William Ferguson, Linda Flaherty, Jenine Furry, Atleah Grubb, Jim Hamilton, and Wilma Hamilton. A note at the bottom left of the table states 'Clergy are not editable'. The URL at the bottom left of the page is https://www.wpaumc.org/dashboard/leaders.

Updating 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.

See page 4 for instructions on managing your church leadership

Action	Assignment	Person	Start Date	End Date	Class
Edit Assignment	A) Administrative Board/Council Chair	[Hatched]	10/01/2017	12/31/2020	
Edit Assignment	B) SPR/PPR Chair	[Hatched]	01/01/2018	12/31/2020	
Edit Assignment	C) Treasurer	[Hatched]	01/01/2007		
Edit Assignment	D) Finance Chair	[Hatched]	01/01/2018	12/31/2020	
Edit Assignment	F) Lay Leader	[Hatched]	01/01/2008		
Edit Assignment	G) Lay Member to Annual Conference	[Hatched]	01/01/2011	12/31/2018	
Edit Assignment	I) Trustee Chair	[Hatched]	01/01/2016	12/31/2018	
Edit Assignment	J) Church Secretary	[Hatched]	01/23/2012		
Edit Assignment	L) UM Women President	[Hatched]			

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

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|--|--|
| 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 |
| I) Trustee Chair | V) Nurture Chair |
| J) Church Secretary | W) Witness 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

- If the person you wish to enter is already listed with the correct position and information, do nothing.
- If a person is listed in a leadership position, ***but his/her assigned position is changing or has changed:***
 - Click on “Edit Assignment” and fill in the correct end date and click “Save”
 - If a person has an end date, but has agreed to serve past that date, update the ending date with the new end date, or if it is unknown, leave the end date blank and click “Save”
- To assign a leadership position to a new person:
 - Scroll to the top of the page and click on the green “Add Position Assignment” button
 - From the dropdown menu, select the leadership position to which you are assigning the person
 - If the person is listed in your church contact list, click the “Pick this Person” button to the left of the person and fill in, as applicable, the start and end dates. (if a person has committed to serving for 3 years, you can fill in the start date, for example, 1/1/20xx and an end date 3 years later of 12/31/20yy). Finish by pressing the “Save” button.
 - If the person is not already in your church contact list, continue to the “*Can't find the person in your church? Search the whole database...*” section and enter the person’s last name or first and last name. Look through the results and if the person you are looking for is here, click the “Pick this Person” button to the left of the person and fill in, as applicable, the start and end dates. (if a person has committed to serving for 3 years, you can fill in the start date, for example, 1/1/20xx and an end date 3 years later of 12/31/20yy). Finish by pressing the “Save” button.
 - If the person is not in this list, scroll to the bottom “*Still not able to find the person?*” section and click “Add a brand new person to our database.” Complete the new contact information, being sure to include the mailing address, email address and phone number. When finished, click the “Add new contact and create assignment” button at the bottom. In the next window, add the start and end dates, as applicable, and click “Save.”

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