SOUTH GEORGIA CONFERENCE
MY CHURCH DASHBOARD USER GUIDE
Updated July 2018

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CHURCH DASHBOARD INTRODUCTION

The South Georgia Conference Church Dashboard (dashboard) is a web-based feature that allows local churches to update the information for their church in the conference-wide database which also populates our conference website. This conference-wide database is shared by all offices in the South Georgia Conference, including district offices, administratives services, episcopal, connectional ministries, etc.

The dashboard gives churches the opportunity to add their local leaders directly into the conference database, allowing the conference and district offices the ability to communicate directly with the leaders of the church. It is our expectation hat every local church use the dashboard so that the conference and district offices may have access to the most up-to-date contact and position information for your church's leaders. 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 Conference Data Specialist Meredyth Earnest (meredyth@sgaumc.com).

LOGGING IN TO THE CHURCH DASHBOARD

There are two ways to access the login screen for the church dashboard.
Option 1: Visit www.sgaumc.org and click on "Dashboard " on the very top of the screen.

Option 2: Type https://www.sgaumc.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. Each individual church has a unique login. 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. If you are unsure of what email address is recorded for your church, please contact your district office. 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.

Once you have logged in, you will be presented with the homepage of the church dashboard:
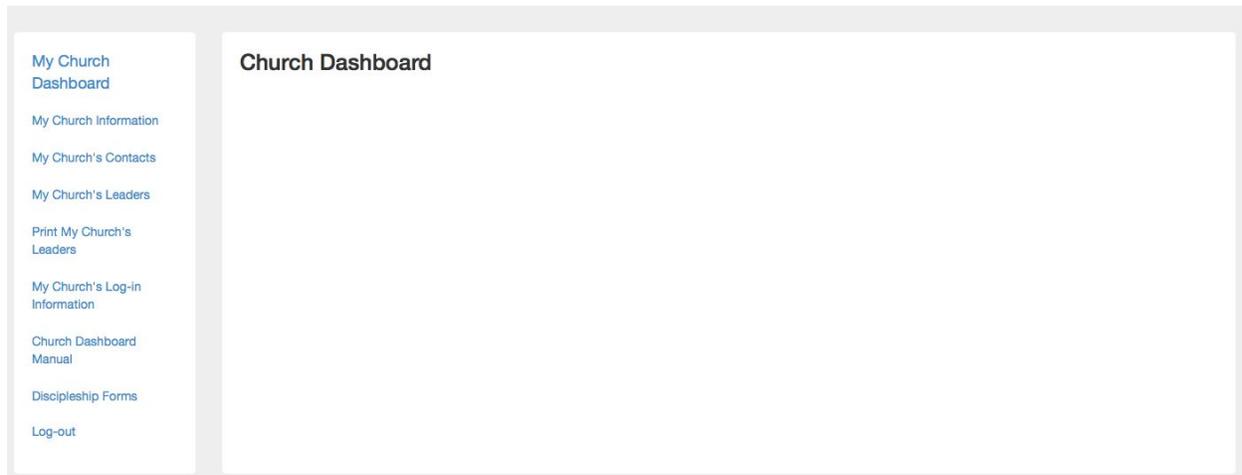
MY CHURCH DASHBOARD HOME PAGE

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:

- **My Church Information**
- **My Church's Contacts**
- **My Church's Leaders**
- **Print My Church's Leaders**
- **My Church's Login Information**
- **Pastor(s) Compensation Report**
- **Church Dashboard Manual**
- **Discipleship Form**
- **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 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 some of the displayed fields (some fields are "view only" and may be updated only by contacting your District Office).

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

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: When entering the addresses for your church, be sure to put the PHYSICAL address for your church in the appropriate fields. This enables the website to show a map to your church.

When you have finished updating the information for your church, click on "SAVE."

MY CHURCH'S LEADERS

This area allows you to input your local church leaders into the conference database so that the conference and district offices can contact your leaders with important information about their ministry. **This area also serves as your Charge Conference Leadership List Report.** The dashboard allows churches to print lists and download contact information for their leaders. Click on "My Church's Leaders" and the following page will display:

In this area, you can enter/edit all of your church's leadership assignments. To edit an assignment for an existing leader, click on "Edit" and the following screen will come up.

Church Leadership

[Save]

People   Meredyth Earnest

Assignment Dates ▾

Start   1/1/2017   📅 Date   🕐 Time

End   12/31/2018   📅 Date   🕐 Time

To remove a person from an assignment, give them an end date. Don't blank out their position.

Church Leader Assignment ▾

Position   LC Worship

Office Types and Other Tags   [   ] ▾

Notes   [   ]

[Save]

Whether the person has been re-elected to the same position or not, all you need to change on this screen is the end date. If you leave it at 12/31/2018, as the example above shows, the assignment will automatically expire and you will no longer see it after 12/31/2018. If you change it to 12/31/2019, this person's record will reflect the assignment until that date. If the person has been elected to a different leadership assignment, put an end date on this record and hit "Save".

To add a new assignment to a leader, hit the green "add new assignment" button:

Pick the assignment you wish to give (i.e. Lay Leader) from the drop down window. Required positions are indicated with an asterix.
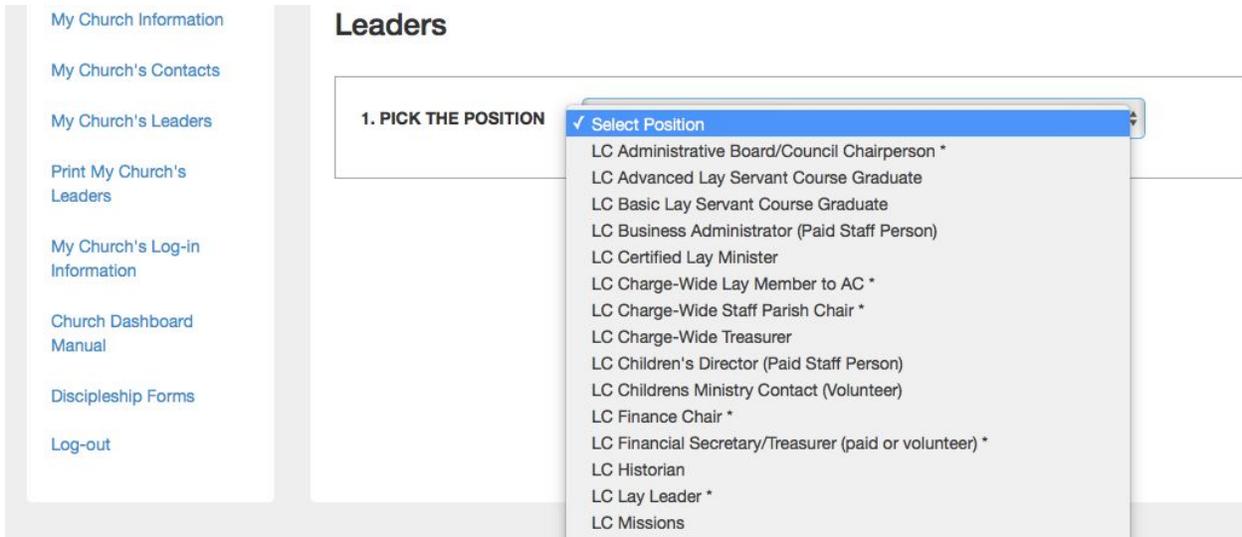
Once you have selected the assignment, first review the names of your existing leaders and choose the correct one if he or she is already in your contacts.

Leaders

1. PICK THE POSITION   LC Lay Leader *

2. PICK THE PERSON - LOOK AT PEOPLE IN YOU

Pick this person →	Tammy Brown
Pick this person →	Lee Bush
Pick this person →	Catherine Catledge

If they are not already in your Contacts, you can search the entire database to see if there is a database record. If not, create a new contact by selecting "add a brand new person to our database."

Can't find the person in your church? Search the whole database…

mere smith

Sorry, we did not find anyone with that LAST or FIRST name in our database

Still not able to find the person?

Add a brand new person to our database

After entering contact information, you may then add the leadership assignment.

PRINT MY CHURCH'S LEADERS

Click on this link to display a printable list of all your leaders. You may choose to print either your current year's leaders, or future year's leaders by toggling through the buttons at the top of the page. **For annual Charge Conference reporting, you need to select and then print "Future Leaders" in order to print the necessary document. This will be the leadership list for your church beginning with January 1 of the next calendar year.**

Date: 07/31/2018
Church Name: Bainbridge First UMC
Charge: Bainbridge First UMC

MY CHURCH'S CONTACTS

This area is used to maintain correct contact information (mailing address, phone number, email) for each of your local church leaders. Click on "My Church's Contacts" and the following screen will be displayed. Either search for a contact using the search field, or select the person you wish to edit from the list displayed. You may also download a list of your contacts from this screen. You do not need to enter every contact in your church; only those with leadership assignments.

Click on "Edit" to make any necessary changes and hit "Save". Please enter the complete zip plus 4 for all addresses. To find this information, go to
https://tools.usps.com/go/ZipLookupAction!input.action

MY CHURCH'S LOGIN INFORMATION

This area is used to change the login information for your church. (This login is for the church, not an individual or a charge.) If more than one person at your church accesses this program, you will need to inform him or her of <u>any change</u> made to the church's login information. We recommend updating login information with a pastoral appointment change. Click on the "Update" button to use this feature.
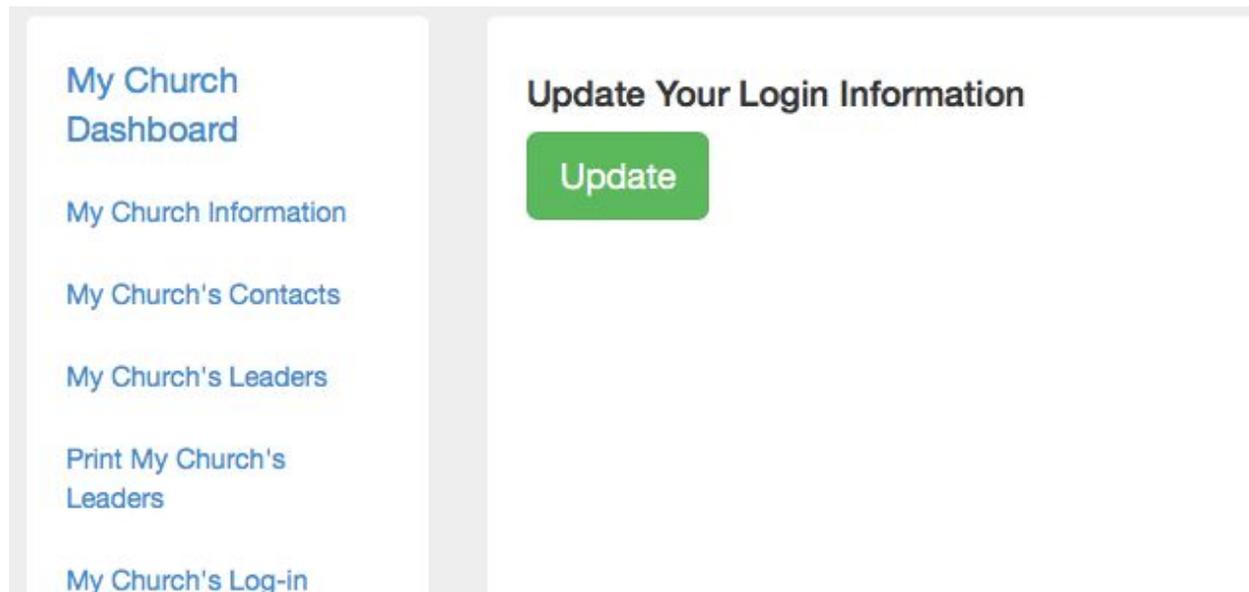
Enter the new username that you want to use, enter the new password and then re-type the new password to confirm it. Click on "Save". Record this information in a secure place.

PASTOR(S) COMPENSATION FORM

During certain seasons of the conference year (Charge Conference and Appointment) an online Pastor's Compensation Form will be visible. Follow the directions to complete a compensation form for each clergy appointed to your charge.

DISCIPLESHIP FORM

Click "Fill out Form" to complete your required, monthly Discipleship Form. You may also view summaries for previous years, or access recent forms if edits are needed.

LOG OUT

After you are finished working in the Church Dashboard, please click on "Log Out" to securely exit the system. You will be returned to the homepage of our South Georgia conference website.