

Pastor Portal Help Guide

Table of Contents

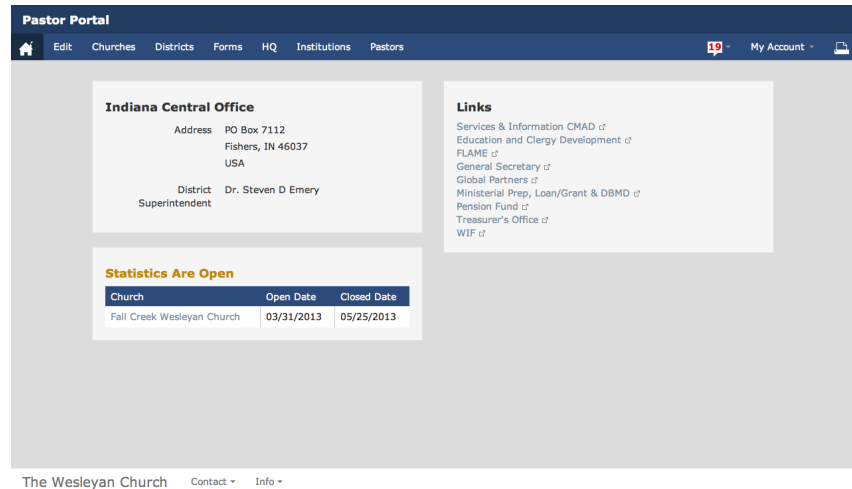
CHURCH MODULE	2
INPUT STATISTICS	2
STATISTICAL REPORT	2
MANAGING CHURCH LEADERS	3
ADDING A CHURCH LEADER	3
REMOVING A CHURCH LEADER	4
GENERAL NOTES	5
APPENDIX	6
A: CHURCHES MENU AND SELECTION	6
B: PASTORS MENU AND SELECTION	6
C: CHURCH LEADERS MENU AND SELECTION	7

Pastor Portal Help Guide

Church Module

Input Statistics

Church statistics can be added or edited from the Church module as long as the date set by your district has not been met. This information is displayed on the home page of the Pastor Portal.



1. From the main menu bar click Churches.
2. Select Input Statistics from the secondary menu row.
3. There are six sections on the left hand side. Click any of the sections and the corresponding questions will load the statistical input window. When you are ready to move to the next section click in the sections list or use the forward or back arrows in the statistical input window.
 - a. Note: you do not have to complete the sections in order.
4. When all of the questions have been answered the system will notify your district office for you. If a questions does not pertain to you be sure to record a zero for the value. All questions must be answered even if the value is zero.

If you pastor multiple churches there is a select box on the left side with your churches listed. Clicking on the church will reload the statistical input window.

Statistical Report

Statistical information is available for all churches as far back as 2006. This information can also be downloaded.

1. From the main menu bar click "Churches".
2. A secondary menu row is displayed with options pertaining to the item from the main menu. The default selection is search on the secondary menu row. Use the filter fields on the left to find the church you want to view. Click the "Stats" button to the right on the church you selected.
3. On the next screen that shows the six sections, click the "Download" button in the upper right side of the screen. A comma separated value file (CSV) will be

Pastor Portal Help Guide

produced that can be opened in Excel. The report will include all of the questions with the various years in separate columns

Managing Church Leaders

This section will allow you to update the contact information or change a position designation for a church leader record. The information consists of: name, title, email address, mailing address, phone number, church name, and position. The information can be changed under the Church menu; see [church leaders](#) in the appendix for details on using the menu and search for local church leaders.

1. Once you have a list of leaders in the results table, click anywhere in the row to select the leader you want to change.
 - a. Note: You can only change leaders serving at your church. If you click on a leader not in your church their information will be viewable only.
 - b. Helpful hint: To return to the results table click the back arrow in your browser or click “Leaders” on the secondary menu bar.
2. Information about key fields on the edit form:
 - a. Fields with a red asterisk are required. These fields cannot be left blank.
 - b. You can change the email address as long as it is shown as an input field. If the email address is listed as just text, you cannot change it because the address is being used as the username to log into one of the portal sites.
 - i. Note: If the address needs to be changed, contact the church leader and have them change the address.
3. To assign a position to the leader, click the “Add new record” link. Use the select list for the desired position.
 - i. Note: The leader’s record can have more than one position record, just keep clicking the “Add new record” until all of the positions have been recorded.
4. To remove a position, click the “Delete” button next to the position you want to remove.
5. Be sure to save the record by clicking the “Save” button in the upper right corner of the screen.

Adding a Church Leader

Adding a new church leader record is started from the secondary menu bar by selecting “Add a Leader” which is under the “Churches” main menu bar; see [church leaders](#) in the appendix for details on using the menus and selecting a leader.

1. Select “Add a Leader” from the secondary menu bar under Churches.
2. The next step is to see if the person already exists in the system in another capacity. This is an important step as it help to have the persons contact information only once in the system.

Pastor Portal Help Guide

3. Use the filter fields on the left to narrow the results table to the right.
4. If the person you need is in the results table clicking on their row will load their information on the “Add a Leader” page.
5. If the person is not in the list then click the “Create” button in the lower right corner of the results table screen.
6. Fill in or make corrections to all of the fields.
 - a. Note: Fields with a red asterisk are required. These fields cannot be left blank.
 - b. You can change the email address as long as it is shown as an input field. If the email address is listed as just text, you cannot change it because the address is being used as the username to log into one of the portal sites.
 - i. Note: If the address needs to be changed, contact the leader and have them change the address.
7. To assign a position to the leader, click the “Add new record” link. Use the select list for the desired position.
 - b. Note: The leader’s record can have more than one position record, just keep clicking the “Add new record” until all of the positions have been recorded.
8. Be sure to save the record by clicking the “Save” button in the upper right corner of the screen.

Removing a Church Leader

If the person is no longer designated to a church leader position, their record needs to be removed. Records are removed by selecting the leader using the “Search” off of the secondary menu bar which is under the “Churches” main menu bar; see [church leader](#) in the appendix for details on using the menus and selecting a leader.

1. Once you have a list of leaders in the results table, click anywhere in the row to select the leader you want to remove.
 - a. Note: You can only remove leaders serving at your church.
2. Click the “Remove” button in the upper right hand corner of the screen.

Pastor Portal Help Guide


General Notes

The statistical site is opened on March 31 of each year for local churches to enter information at the end of their church year. Each district will set the date as to when the inputting session is closed for local churches.


Pastor Portal Help Guide

Appendix

A: Churches menu and selection

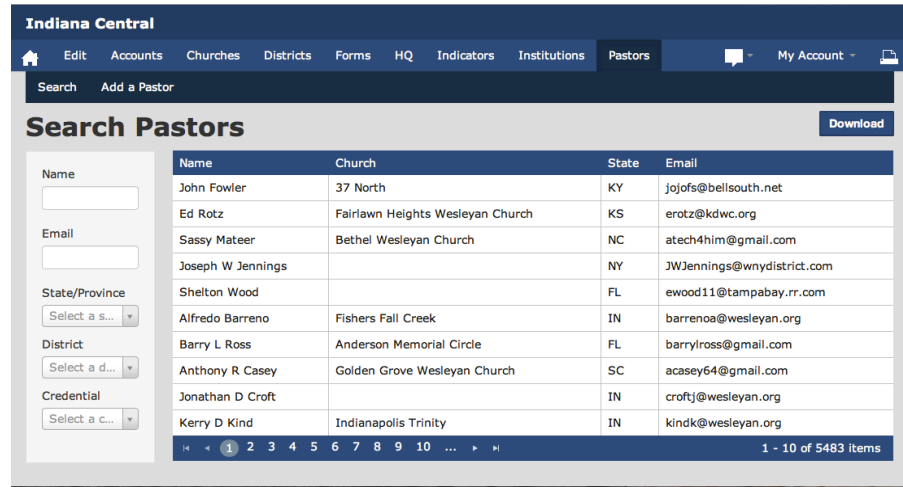
1. From the main menu bar click “Churches”. Mobile devices such as tablets or smartphones will display a menu with three white bars as an icon.  Clicking on the icon will show the main menu options.
2. A secondary menu row is displayed with options pertaining to the item from the main menu. The first item on the secondary menu is the default for the main menu item. In this case since Churches was select the “Search” menu is displayed.
3. Use the filters on the left side to narrow the results. The results table to the right will automatically display the filtered results. Any combination of the filter fields can be used.
 - a. An important item to note is the Status filter. The default setting is “Open”. The other options for status are: closed, pending, and inactive. Therefore if you are looking for a closed church, change the status to Closed.
 - b. To clear select list filter fields like District, click the “x” inside the select list. Text fields like Name highlight the text and press the delete key.
4. The results table will display church name, city, and state. Any column can be sorted by clicking on the heading bar of the field. The columns can be sorted in ascending, descending, or default order by clicking through the cycle.

B: Pastors menu and selection

1. From the main menu bar click “Pastors”. Mobile devices such as tablets or smartphones will display a menu with three white bars as an icon.  Clicking on the icon will show the main menu options. **Figure 4**
2. A secondary menu row is displayed with options pertaining to the item from the main menu. The first item on the secondary menu is the default for the main menu item. In this case since Churches was select the “Search” menu is displayed
3. Use the filters on the left side to narrow the results. To work with pastors within your district, change the District select list to your district. The results table to the right will automatically display the filtered results. Any combination of the filter fields can be used.


Pastor Portal Help Guide

- a. To clear select list filter fields like District, click the “x” inside the select list. Text fields like Name highlight the text and press the delete key.



4. The results table will display name of the pastor, church attending or appointed, state, and email address. Any column can be sorted by clicking on the heading bar of the field. The columns can be sorted in ascending, descending, or default order by clicking through the cycle.

C: Church Leaders menu and selection

1. From the main menu bar click “Churches”. Mobile devices such as tablets or smartphones will display a menu with three white bars as an icon. Clicking on the icon will show the main menu options.  **Figure 4**
2. A secondary menu row is displayed with options pertaining to the item from the main menu. From the secondary menu row select “Leaders” to change information or select “Add a Leader” to create a new entry.
3. Use the filters on the left side to narrow the results. To work with leaders within your district, change the District select list to your district. The results table to the right will automatically display the filtered results. Any combination of the filter fields can be used.